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FOUNDATION FOR VICTORY:
OPERATIONS AND INTELLIGENCE HARMONIOUSLY
COMBINE IN JACKSON'S
SHENANDOAH VALLEY CAMPAIGN (1862)

BY

SHAWN B. STITH

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Thesis Advisor:

Russel H.S. Stolfi

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in Jackson's Shenandoah Valley Campaign (1862)**

by

Shawn B. Stith
Captain United States Marine Corps
B.A. History, University of Central Florida, 1983

Submitted in partial fulfillment of the
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NAVAL POSTGRADUATE SCHOOL
June 1993

Author: _____

Shawn B. Stith
Shawn B. Stith

Approved by: _____

Russel H.S. Stolfr

Russel H.S. Stolfr, Thesis Advisor

Ralph Norman Channell

Ralph Norman Channell, Second Reader

Thomas C. Bruneau

Thomas C. Bruneau, Chairman, Department of
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ABSTRACT

Using the Shenandoah Valley campaign of 1862 as a case study, the thesis examined fundamental principles which determine the effectiveness of intelligence in the planning and execution of military operations. General Thomas J. (Stonewall) Jackson aggressively obtained intelligence as the foundation of his operational plans, enabling his numerically inferior force to win victories of strategic importance. Jackson centrally controlled intelligence at the operational level, emphasized analysis of the area of operations, and effectively used technical experts throughout the campaign, allowing him to recognize operational threats and opportunities as they arose. The Confederate commander personally directed the intelligence effort and his operational flexibility guaranteed a harmonious relationship between intelligence and operations. Modern armed forces would do well to extract and apply the warfighting intelligence fundamentals revealed in Jackson's campaign, which remain independent of time, place, and technology.

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TABLE OF CONTENTS

I. THE INTELLIGENCE FOUNDATION.....	1
A. THE MYSTIQUE OF THE VALLEY CAMPAIGN.....	1
B. THE FRAMEWORK OF INTELLIGENCE.....	12
C. INTELLIGENCE IN THE CIVIL WAR.....	24
D. INTELLIGENCE AND OPERATIONS.....	43
II. WINTER EXPEDITIONS.....	56
A. JACKSON AND THE VALLEY.....	56
B. OPERATIONS ALONG THE POTOMAC.....	71
C. THE ROMNEY EXPEDITION.....	82
D. PROBLEMS OF COMMAND.....	96
E. THE BEGINNINGS OF JACKSON'S INTELLIGENCE.....	105
III. FEDERALS TAKE THE OFFENSIVE.....	112
A. THE ADVANCE ON WINCHESTER.....	112
B. KERNSTOWN.....	125
C. THE FEDERAL PURSUIT.....	142
D. THE ROLE OF INTELLIGENCE DURING THE FEDERAL ADVANCE....	156
IV. JACKSON BEGINS HIS OFFENSIVE.....	168
A. THE ROAD TO MCDOWELL.....	168
B. THE BATTLE OF MCDOWELL.....	186
C. THE PURSUIT TO FRANKLIN.....	201
D. INTELLIGENCE DURING THE EXPEDITION TO MCDOWELL.....	215
V. THE MARCH TO THE POTOMAC.....	227
A. FRONT ROYAL.....	227
B. WINCHESTER.....	247
C. THREATENING THE POTOMAC.....	269

D. INTELLIGENCE DURING THE ADVANCE.....	276
VI. CONCLUSIONS.....	289
A. CAMPAIGN EPILOGUE.....	289
B. INTELLIGENCE SUMMARY OF THE CAMPAIGN.....	294
C. CHARACTERISTICS OF JACKSON'S INTELLIGENCE.....	307
D. APPLICATIONS FOR TODAY.....	319
LIST OF REFERENCES.....	331
INITIAL DISTRIBUTION LIST.....	334

LIST OF TABLES

1. THE ROUTE TRANSPORTATION CIPHER.....	54
2. THE VIGINERE ENCRYPTION SYSTEM.....	55
3. THE OPPOSING FORCES AT KERNSTOWN	
A. The Union Army.....	161
B. The Confederate Army.....	162
4. CASUALTIES AT KERNSTOWN.....	163
5. THE OPPOSING FORCES AT MCDOWELL	
A. The Union Army.....	220
B. The Confederate Army.....	221
6. CASUALTIES AT MCDOWELL.....	222
7. THE OPPOSING FORCES AT FRONT ROYAL AND WINCHESTER	
A. The Union Army.....	280
B. The Confederate Army.....	281-282

LIST OF MAPS

1. THE SHENANDOAH VALLEY.....	109
2. AREA OF OPERATIONS: DECEMBER 1861.....	110
3. AREA OF THE ROMNEY EXPEDITION.....	111
4. THE FEDERAL ADVANCE TOWARDS STRASBURG.....	164
5. KERNSTOWN: INITIAL FEDERAL AND CONFEDERATE DEPLOYMENTS.....	165
6. KERNSTOWN: FEDERAL REPOSITIONING.....	166
7. THE UNION PURSUIT.....	167
8. THE CONFEDERATE ADVANCE TO THE TOWN OF MCDOWELL.....	223
9. BATTLE OF MCDOWELL: INITIAL POSITIONS.....	224
10. BATTLE OF MCDOWELL: CONFEDERATE REPOSITIONING.....	225
11. THE CONFEDERATE PURSUIT TO FRANKLIN.....	226
12. THE CONFEDERATE ROUTE TO FRONT ROYAL.....	283
13. BATTLE OF FRONT ROYAL.....	284
14. THE CONFEDERATE PURSUIT TO CEDARVILLE.....	285
15. THE CONFEDERATE PURSUIT TO WINCHESTER.....	286
16. BATTLE OF WINCHESTER.....	287
17. THE CONFEDERATE ADVANCE TO THE POTOMAC	288

EXECUTIVE SUMMARY

Confederate general Thomas J. "Stonewall" Jackson's Shenandoah Valley campaign of 1862 stands as a classic illustration of the strategic impact that small military forces may exert within a theater of war. The results of Jackson's campaign were significant. The abundant resources of the Shenandoah Valley were retained under Confederate control. Major elements of three Federal military departments were defeated in a series of small but important battles. The Union's strategic plans for the continued siege of Richmond, the occupation of western Virginia, and an advance into eastern Kentucky were severely disrupted.

Throughout the course of the campaign, Jackson consistently used his available intelligence as the foundation for many of his operational decisions. In those situations where the Confederate commander specifically defined his intelligence requirements, aggressively sought to obtain information, and decisively responded to current intelligence assessments, Confederate operational capabilities were improved. Conversely, in those instances where Jackson ignored intelligence indications or failed to respond operationally to available intelligence, such as the battles at Kernstown and McDowell, Confederate operational performance was unsatisfactory.

Jackson centralized his intelligence at the operational level, enabling effective direction of the intelligence effort, the most efficient use of limited collection assets, and concentration on those pieces of information that were of greatest significance to

the operational commander. Those elements of operational reality that could have the greatest impact on Confederate operations received the most attention. This concentration of intelligence also ensured a comprehensive analysis of reporting from all available sources, the avoidance of conflicting assessments, and an absence of duplication.

The Confederate commander emphasized analysis of the area of operations as a means to exploit the region's geography and to better understand the enemy situation in the context of its physical setting. Jackson initiated extensive mapping and topographic analysis, permitting the recognition of masked axes of advance, suitable points of defense, and possible enemy courses of action. This analysis, in turn, let Jackson optimize the impact of his operations against the Federals while avoiding potential operational pitfalls suggested by the terrain.

Jackson also used talented experts and experienced subordinates in the performance of particular intelligence functions during the campaign. Because he had neither the time nor expertise to personally analyze all of the important specifics that contributed to the overall intelligence picture, Jackson relied on the technical expertise of staff officers and subordinate commanders, regardless of rank or formal military training, to help meet his intelligence requirements.

The most important aspect of Jackson's intelligence was its harmonious relationship with operations. Jackson's personal direction and supervision of intelligence ensured that intelligence

collection and analysis remained focused on areas of operational significance. Similarly, his control over both intelligence and operations allowed for the effective inclusion of current intelligence in the flexible planning and execution of Confederate operations.

While Jackson's employment of the principles of war and use of maneuver were important factors in the success of the Confederate campaign, his approach to intelligence and operations as inseparable parts of a larger whole provided the bedrock for the planning and execution of Confederate operations. The effective application of Jackson's warfighting intelligence fundamentals provides operational advantages that transcend time, place, or technology.

I. THE INTELLIGENCE FOUNDATION

A. THE MYSTIQUE OF THE VALLEY CAMPAIGN

Thomas J. "Stonewall" Jackson's Shenandoah Valley campaign of 1862 stands as a classic illustration of the strategic influence that small armies may exert in a theater of war. By quickly maneuvering his force, which only numbered around 17,000 men at its peak strength¹ against various Federal commands, Jackson was able to disrupt the strategic designs of the Union far beyond the bounds of his own military district. Additionally, in a series of small but significant combat victories, the Confederate general freed the Valley from the direct threat of Federal occupation and held this important area under Southern control. The potential lessons offered by the study of the campaign continue to be subjects of interest to both scholars and military leaders.

During the course of the campaign, Jackson's army successfully engaged major elements of three separate Federal military departments and altered the offensive plans of Northern commanders in each of these areas. Although the number of troops available to any of these individual Federal commands outnumbered the Confederate Army of the Valley, Jackson's employment of his force against isolated parts of the enemy allowed him to dictate the terms of the contest. Gen. Fremont, commander of the Union's Mountain Department, was forced to cancel his plans for an offensive

¹Douglas Southall Freeman, Lee's Lieutenants: A Study in Command; (Volume One) Manassas to Malvern Hill (New York: Charles Scribner's Sons, 1942) 485.

push into Kentucky during the spring of 1862² after Jackson defeated a subordinate Union unit and threatened that department's entire eastern flank. The forces of the Federal Department of the Shenandoah, under the command of Gen. Banks, were frustrated in their drive to seize control of the Valley and were eventually driven from the district in the wake of a disastrous defeat. Although he had been planning to join McClellan's Army of the Potomac for the siege of Richmond, Gen. McDowell, the commander of the Department of the Rappahannock, was forced to postpone the proposed junction and instead diverted forces towards the Valley in an attempt to aid Banks and Fremont.³ McDowell's units, however, were also severely handled by the Confederates.

The immediate effects of Jackson's campaign against the Federals were impressive. The Union forces were driven from the upper Valley. The 120,000 man army under Gen. McClellan was stalled in its move towards Richmond and over 40,000 more Union soldiers were diverted from joining McClellan's offensive.⁴ Jackson had used his small army so effectively that he had forced Federal authorities to modify the Union's strategic plan for the capture of Richmond despite the fact that the

²U.S. War Department, The War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies 128 Vols., ed. by Robert N. Scott, (Washington, D.C.: U.S. Government Printing Office, 1880-1901), Vol. 12, Pt. 1, 7. Reference hereafter cited as "O.R." in accordance with common practice. 12 April 1862 letter from Fremont to President Lincoln.

³Freeman, 485.

⁴Champ Clark, Decoying the Yanks: Jackson's Valley Campaign (Alexandria, Virginia: Time-Life Books, 1984) 21.

diversionary nature of the campaign may have been recognized by the North's senior leadership.⁵

In addition to its adverse effects on the Federal army, the campaign resulted in the continued Southern control of the Valley's vital assets. The important transportation and communications routes which passed through the Valley, and thereby linked Richmond with the western Confederacy, remained under effective Confederate control. Associated with this retention of control over the approaches to Richmond was the general protection of the western flank of Confederate defenses in Virginia. Because of its unique geographical situation between two mountain ranges, the Shenandoah Valley also offered a ready offensive axis for any army moving to penetrate deep into an opponent's territory in the eastern theater.⁶ Under Southern control, the Valley remained a dangerous salient which flanked Washington and threatened Maryland and Pennsylvania as a potential route for invasion. Under Northern control, the Valley could offer an important route for the isolation of Richmond or movements into Kentucky. The cornucopia of foodstuffs provided by the Valley's abundant farms, a vital Confederate supply asset throughout most of the war, was also held.⁷ While increasingly larger sections of Southern territory and their associated products came under Federal occupation, continued Confederate access to the rich agricultural harvest of the Valley would help supply the Army of Northern

⁵Freeman, 485.

⁶Clark, 21.

⁷Ibid.

Virginia with enough provisions to launch two invasions of the North and to forestall defeat for three more years.

This operational victory came at a time when a besieged and somewhat dispirited South needed a military win.⁸ The campaign, conducted as an independent operation apart from the main theater of war, helped to raise Jackson, a leader already known for his strong religious sentiments, harsh discipline, and personal idiosyncracies, to international fame.⁹ The positive results of the campaign brought hope to people throughout the South and earned Jackson the respect of senior military leaders, a factor that would allow him to gain even greater military success and fame in subsequent campaigns.

For military scholars, however, the basis of Jackson's success in the Valley campaign may offer a more challenging and satisfactory area of study than an analysis of the immediate results of the operation. In other words, *how* was Jackson able to achieve these positive operational results? As has already been noted, when compared to the forces available for employment by his opponents, Jackson possessed inferior numbers in both men and weapons throughout the campaign. The characteristics of the weapons used by the Confederates offered no advantage to the Southern troops, generally being equal to or in many cases inferior to those weapons used by their Federal counterparts. Muzzle loading percussion rifles of musket length were the main infantry weapon in use by both sides, although some Southern units

⁸Freeman, 485.

⁹Ibid., 486.

continued to be armed with smoothbore flintlock muskets at this stage of the war.¹⁰ Muzzle loading field artillery pieces, of both smoothbore and rifled types, were also relatively common to both sides in the campaign. The tactics employed by the belligerents were another commonality that offered no real advantage to either side. While Confederate execution of accepted tactics in the cavalry and artillery arms was arguably superior during this stage of the war, the capable, though generally unimaginative, execution of infantry tactics was similar between Union and Confederate forces.¹¹

Many students of military art have pointed to the general mobility and maneuvers of Jackson's command as the causal factors of the Confederate achievement. This argument cites the consistently mobile nature of Jackson's operations and the numerous examples in which Southern movements put the Federal forces at an operational and tactical disadvantage. While mobility and maneuver did play an important part in the execution of the Confederate operations, movement, in and of itself, can hardly be seen as the fundamental element of the Southern success. In the context of the dangerous and violent realities of war as it really is, other factors had to be present for a Confederate operational victory.

¹⁰O.R., Vol. 5, 389. After-action report in which Jackson credits Gov. Letcher of Virginia with supplying 1550 percussion muskets to replace some of the flintlocks still in use.

¹¹Throughout the war, the standard for infantry tactics was prescribed in the text of William J. Hardee, Rifle and Light Infantry Tactics (Philadelphia: J.B. Lippincott and Co., 1861 [also, numerous other publishers and dates]).

In his monumental study of the leadership of the Army of Northern Virginia, Douglas Southall Freeman cites three major reasons for Jackson's success.¹² Proper judgement of the ground, a sound balance of strategy, and the superior use of this strategy to impose his will on the Union enemy are all listed by Freeman as the leading causal factors of Jackson's dominance during the campaign. While the basic formulation of Freeman's assessment points to these three factors as the primary basis for the Southern operational victory, it predominantly emphasizes Confederate reliance on the successful application of the principles of war. Although Freeman credits the Southern leader with proper judgement of the ground, this evaluation is balanced with the assessment that Jackson had little natural talent for remembering details about the area's terrain.¹³ The Confederate commander did, however, have the ability to correctly interpret the military significance of geography once the physical features of an area were clearly pointed out to him. On the operational level, the Southern general's great reliance on accurate maps and updated terrain information allowed him to exploit the physical attributes of the theater of operations to their greatest potential. Additionally, Jackson's tactical understanding of the terrain allowed for a capable sense of position on the battlefield and a competent disposition of his forces in combat.

Freeman's interpretation of a "sound balance of strategy" is based on perceptions of Jackson's concentration of effort, effective logistics, and use of secrecy to achieve

¹²Freeman, 481-485.

¹³Ibid., 481.

surprise.¹⁴ The idiosyncratic commander's extreme practices of operational security and reliance on deception were overt attempts to realize the benefits of surprise against the Federal forces. The application of another principle of war, concentration of effort, was revealed in the repeated efforts to bring a superiority of numbers against weaker parts of the enemy forces. Additionally, Freeman's representation of Jackson's sound logistics effort emphasizes the way in which this endeavor supported the general tempo of Confederate movements and force concentrations.

Finally, Freeman's portrayal of Jackson's use of his own strategy to impose his will upon the Federal commanders is directly tied to the Confederate leader's ability to seize and retain the initiative throughout the campaign.¹⁵ By exercising the operational initiative, Jackson was able to limit Federal courses of action and thereby caused the enemy to react to Southern moves rather than act according to his own designs.

Clearly, Jackson's habitual application of the principles of war played an important and perhaps pivotal role in deciding the outcome of the campaign. The Southern general's dedicated use of initiative, concentration of effort, surprise, and tempo marked his performance as the Confederate operational commander vastly superior to the efforts of the various Union commanders whom he opposed. Despite the appalling initial weakness of Confederate military force in the Shenandoah Valley District in the fall of 1861, Jackson began offensive operations soon after his arrival

¹⁴Ibid., 482.

¹⁵Ibid., 484.

in November of that year. Although these initial moves were limited in their scope and objective, they still had a profound effect on subsequent planning by Union commanders. The destructive Confederate raid against the Chesapeake and Ohio Canal and the ensuing expedition to Romney during the winter of 1861-1862 were overtly offensive in nature and caused the Federals to reassess the rather innocuous approach they had previously taken towards the Southern military forces in the area. To counter the combative Confederate general, the Federals were forced to amass a numerically superior force to sweep the enemy from the region. Even when he was forced to yield to the overwhelming superiority of the advancing Federals, however, Jackson tried to capitalize on potential opportunities and regain the operational initiative. First at Kernstown in March and then throughout his strategically important offensive campaign in May and early June, Jackson re seized the initiative and doggedly held on to it through repeated attacks against his foe. Although the Union forces were eventually able to advance again up the Valley, their moves were constantly in response to Jackson's actions and failed to reflect any plan of their own. Additionally, various offensive actions undertaken by Jackson limited the possible courses of action available to the Union commanders and invariably forced the Federal units into situations that were advantageous to the Confederates.

Concentration of effort was a second principle that Jackson applied during his offensive campaign. Recognizing the relative weakness of his own force, the Confederate general realized the need to use the majority of the Confederate offensive combat power against smaller, and potentially isolated, enemy detachments. By

uniting his own force with other available Southern units operating in the area, Jackson was able to amass a local superiority against the Federals whom he opposed. This concentration was first seen in his move towards Romney when he expelled the occupying Federal forces from the Valley after combining his own limited force with the Confederate command of Brig. Gen. Loring. It was further refined and exploited during May and June when Jackson united his own division-sized army with the forces of Edward Johnson and Richard Ewell and then successfully defeated the Federals in five separate battles. Even at Kernstown, where Jackson suffered his only real defeat in the Valley, the Confederate general attempted to concentrate his effort against what he thought to be a smaller and unsupported enemy detachment.

Surprise, which Clausewitz suggests "...lies at the root of all operations without exception...."¹⁶, was an additional principle that Jackson sought in his own operations. Faced with an enemy who could easily have gathered a numerically larger force at virtually any point in the theater, Jackson was forced to rely on surprise as an integral element of his operations "...for without it superiority at the decisive point is hardly conceivable."¹⁷ Through the consistent application of secrecy and deception, the intelligent use of the theater's geography, and speed movement, the Confederate general was able to appear opposite his enemy at unexpected times and places during various phases of the campaign. Additionally, by hiding his intentions

¹⁶Carl von Clausewitz, On War (ed. and trans. by Michael Howard and peter Paret. Princeton, New Jersey: Princeton University Press, 1984) 198.

¹⁷Ibid.

from the enemy and thereby doing the unexpected, Jackson was able to capitalize on the vulnerabilities of Federal forces who remained unaware of the immediate Confederate threat.

Tempo, the hard press of military operations to ensure the maximum exploitation of opportunities and enemy vulnerabilities, was another major principle of war that Jackson successfully followed as a means to victory. With the initiation of his operational offensive in May, Jackson continually kept his opponents off balance by pressing the attack, pursuit, and counterattack against one enemy force after another with little or no substantial break in the action. While Confederate retreats were conducted at an exceedingly slow pace in an effort to delay the loss of territory and to retain contact with the advancing enemy, the speed with which Jackson moved his soldiers in offensive maneuvers led to their notoriety as "foot cavalry." Jackson's aggressive tempo may be illustrated in the fact that his command marched over 640 miles in 48 days,¹⁸ fought and won five battles in the period of a month, and consistently reached operationally important positions well in advance of the enemy, despite the fact that the Union forces were often closer to the objective than the Confederates had been.

While the effective application of these principles of war undoubtedly played a pivotal role in Jackson's campaign, a further question is suggested by the Confederate general's consistent use of these principles. How did Jackson know when and where to apply these principles? In order to seize the initiative, the Confederate commander

¹⁸Clark, 21.

had to be aware of some opportunity or enemy vulnerability that would allow him to take the offensive. Similarly, Jackson would have to know the general location, size, and disposition of the enemy forces in order to effectively concentrate his own force against them. While concentration of effort appears to be an intrinsically straightforward principle, "... the theoretical simplicity of achieving numerical superiority at the decisive point belies the difficulty experienced in all aspects of its implementation."¹⁹ Similarly, surprise could only be attained by a commander who knew something about the enemy's probable plans and courses of action. The aggressive tempo of the Confederate offensive could only be maintained if the Southern commander remained aware of the enemy's position, was well informed about the best routes for movement, and was able to properly assess the enemy's capability to resist his own moves.

Clearly then, Jackson had to have an effective understanding of the theater of operations and the enemy situation that confronted him to effectively plan his own operations and to correctly apply the principles of war. In turn, logic would suggest that this knowledge would have been the natural provenance and product of a military intelligence effort designed to meet these fundamental needs. A study of the intelligence considerations and activities which helped to shape Jackson's operational planning and decisions during the Valley campaign may, therefore, offer some insight into the primary foundation for the Confederate military victory in the spring of 1862.

¹⁹Michael I. Handel, "Intelligence and Military Operations", in Michael I. Handel, ed., Intelligence and Military Operations, (London: Frank Cass & Company, Limited, 1990) 13.

Such a study may also reveal certain universal aspects and characteristics of military intelligence that could increase the overall utility and effectiveness of intelligence in any military campaign.

B. THE FRAMEWORK OF INTELLIGENCE

Before assessing the role of intelligence in the decision making process of a military campaign or analyzing those characteristics of intelligence which make it useful in military operations, it is, of course, necessary to establish a definition of military intelligence. In the most general sense, intelligence gathering may be seen as an attempt to minimize those uncertainties and frictions that are an integral part of armed conflict. Carl von Clausewitz, the paragon of military thought and philosophy, wrote that "By 'intelligence' we mean every sort of information about the enemy and his country--the basis, in short, of our own plans and operations."²⁰ Clausewitz's definition is notable both in its potentially broad scope, as consisting of "every sort of information" regarding an enemy and a theater of operations, and in its clear connection of intelligence with operational planning.

In an expanded definition that attempts to recognize some of the complexities of gaining valuable knowledge about an enemy while highlighting the need for operational relevancy, the U.S. military has defined intelligence as "...the product resulting from the collection, evaluation, analysis, integration, and interpretation of all available information concerning one or more aspects of foreign countries or areas

²⁰Clausewitz, 117.

which is immediately or potentially significant to the development and execution of plans, policies, and operations."²¹ Like Clausewitz's definition, this interpretation emphasizes the broad spectrum of intelligence and the inherent need for operational relevancy. The U.S. definition additionally points to the critical requirement for an intellectual processing of the available information. This delineation of information, or raw data, from processed intelligence clarifies the need to consistently apply the intellect to determine the significance and relevancy of seemingly unconnected facts.²² Although the product of intelligence may be some type of formal written or hardcopy document, a more accurate and comprehensive interpretation would simply be that knowledge which results from the intellectual process of analyzing information with regard to operational considerations.

Perhaps the most effective way of thinking about intelligence is as a cyclical process.²³ Although this process is sometimes very formalized and easily recognized in its constituent parts or phases, it is more frequently simply a logical progression of thought by a commander, military advisor, or intelligence analyst. The five major parts of this process are the planning and direction of the intelligence effort towards operations, the collection of information, the processing and analysis of that

²¹Headquarters, U.S. Marine Corps, "Fleet Marine Force Manual 2-1", Intelligence, (Washington, D.C.: Headquarters, U.S. Marine Corps, 1980) 1-1.

²²Headquarters, U.S. Marine Corps, "Fleet Marine Force Manual 3-21", MAGTF Intelligence Operations, (Washington, D.C.: Headquarters, U.S. Marine Corps, 1991) 2-1.

²³Joint Chiefs of Staff, "JCS Publication 2-0", Joint Doctrine for Intelligence Support to Operations (Washington, D.C.: Office of the Chairman of the Joint Chiefs of Staff, Proposed Final Draft, 1992) 2-3.

information, the dissemination of this analysis to the pertinent commanders, and the use of this intelligence during the operational planning or decision making process.²⁴ Because the relative importance of certain pieces of information may change during the course of an operation and because the implementation of some decision at the end of the process will naturally lead to the development of new intelligence requirements, this process may also be viewed as a cycle. Revision, redirection, and reassessment of requirements, conclusions, and operational decisions will occur on a constant basis because of the various changes that occur during active military campaigns.

The starting point for the intelligence process must be the determination of the overall direction of the intelligence effort. By narrowing the focus of intelligence to only those things that are of importance to the commander, irrelevant collection and analysis may be avoided. In this initial stage of the process, specific intelligence requirements are identified, prioritized, and validated with regard to the context of planned operations.²⁵ Although specific objectives may not be defined at this point, broad operational goals and the commanders' intentions will help to identify specific intelligence requirements to meet those goals. These requirements are then translated into observable criteria for proper collection and analysis. After identifying the

²⁴U.S. military publications and most scholarly works which examine the intelligence process do not include the "use of intelligence" as an integral phase of the process. However, its inclusion here is based on the perception that it is perhaps the most crucial factor in the relationship between intelligence and operational planning.

²⁵Joint Pub 2-0, 2-4.

particular pieces of knowledge which are essential to optimizing the operational effort, the overall intelligence effort is planned to ensure that each of the requirements will be answered through some type of collection asset, that subordinate needs for intelligence will also be met, and that proper means of dissemination exist for the finished intelligence to reach the decision maker.

The next logical step in the intelligence process is the collection of information which may answer or help to answer those specific requirements identified in the planning of operations. During this fact acquisition phase, military leaders must recognize the need to properly manage the collection assets with regard to the stated requirements. The right source has to be used to collect the right information, unnecessary redundancy has to be avoided, and the desirability of confirmation through multiple-source collection has to be examined. The inherent trade-offs of continued intelligence exploitation or immediate offensive destruction of noted enemy units must also be contemplated. Effective collection must, therefore, involve an understanding of the realistic capabilities and limitations of potential collection assets.

After the information is collected, it must next be processed or analyzed through the perspective of operational significance. Raw data, such as encoded messages, electronic intercepts, or foreign language texts, must first be translated into useable information for analysis. This useable information is then evaluated with regard to reliability and general applicability towards stated intelligence requirements, interpreted through the consideration of its overall operational significance, and

combined with other information to develop an integrated assessment. This analysis should be objective, based on reporting from all available sources, and focused towards answering the commander's specific requirements.²⁶ Further, these assessments must clearly state the overall meaning, relevance and importance of the analysis provided to the operational commander.

In turn, this knowledge must now be disseminated to the people that need it. In other words, the analysis must be conveyed to the commander in an easily understood and useable form such as a written report, electronic message, graphic, oral brief, or annotated map.²⁷ Additionally, various communications means such as couriers, radios, telegraphs, visual signalling, or electronic video transmission may be used to get any of these forms to the commander. Timeliness, pertinence to the commander's needs, usability of the form of dissemination, and operational security should be the major governing factors which determine the form and type of communication used in the dissemination phase.²⁸ Additionally, the general scope of this dissemination to subordinate and higher headquarters must also be judged according to the same criteria.

The final, and perhaps most critical, phase of the intelligence process is the use of the finished analysis in the commander's operational planning and decision

²⁶Ibid., 2-13.

²⁷Ibid., 2-17.

²⁸FMFM 3-21, 3-5 and 3-6.

making.²⁹ While the successful execution of the other four phases is vital to the development of accurate and coherent assessments, the commander's use of this knowledge invariably determines the role that intelligence will play in the success of the operations under consideration. Effective use of this intelligence analysis does not mean that the commander has to accept all of the assessments made. It does mean, however, that the commander should include the intelligence assessment in his own evaluation of the course of future actions. Based on the changes in strategic and operational considerations, information available only to a commander himself, and similar factors, a commander may reject the intelligence assessments. If this intelligence is ignored by a commander, then the entire intelligence effort to that point has actually been a waste of time and effort since it has not contributed to the commander's operational decision. Although a commander's use of available intelligence may seem like an intrinsic quality of all operational planning, numerous historical examples and the realities of war challenge this assumption.

With the implementation of some type of action by the commander, the process does not end but actually continues in a cyclical manner as new information must now be analyzed with regard to the present decisions. Additionally, at any phase in the intelligence cycle, changes in the operational situation, modification of objectives, or continuing ambiguities in analysis may suggest the need to alter the direction, means of collection, or analytical emphasis of the process. The intelligence cycle ends only when all operational objectives have been successfully achieved.

²⁹See Footnote 24.

The intelligence process naturally occurs at every level in the practice of war.³⁰ Strategic intelligence is most often conducted to support national or theater level commanders in the formulation of policy, strategy, and general military plans. In this way, strategic intelligence often helps to shape the general direction of a nation's security policies. Operational intelligence, which is the emphasis of this study, usually supports the planning and conduct of operations and campaigns on the theater level. This level of intelligence is designed to meet the needs of an independent operational commander exercising control within the overall bounds of the national strategy. Tactical intelligence is designed to support tactical operations and is, therefore, normally characterized by its narrow scope, limited analytical content, and relatively perishable nature with regard to usefulness. It is important to consider that, because of the intrinsically ambiguous definitions of the levels of operational planning, there is also a natural overlap among the various levels of intelligence. In many cases, intelligence that is useful at one level may be equally valuable at another. This is especially true of operational intelligence, which acts as a bridge linking strategic analysis with the concrete tactical requirements of war.

As Clausewitz and other military scholars have typically pointed out, this intelligence can be divided into efforts to understand the area in which operations are to be conducted and to understand the enemy against whom one is engaged. While the analysis of these components is habitually conducted independently of one

³⁰Joint Pub 2-0, 2-1.

another, the full impact and importance of these factors on friendly operations can only be captured by integrating these studies into a single, comprehensive assessment.

As one of the two major components of operational level intelligence, analysis of the area of operations forms the "...background on which military plans are drawn."³¹ These assessments examine the possible effects that the theater of operations will have on the actions of enemy forces as well as the ability of friendly forces to achieve their operational goals. Included in this analysis is an evaluation of the important aspects of the military geography, transportation and communications networks, resources, and area inhabitants.

An intelligence appraisal of a region's military geography looks at those physical characteristics that may influence a military unit's ability to conduct operations in an area.³² An evaluation of the topography, including such aspects as major terrain features, obstacles to movement or observation, potentially important points of defense, and navigational landmarks, forms the foundation for any understanding of military geography. Associated with this examination of topography is an evaluation of the significant hydrography of an area. Sundry details of drainage patterns, rivers, lakes, fording points, and in the case of amphibious operations, beaches, currents, and anchorages must be assessed with regard to their potential impact on military operations. Additionally, the potential influence of climate and weather should be understood as an integral element of military geography since it may directly effect

³¹FMFM 3-21, 11-1.

³²Ibid., 11-1.

the combat effectiveness of any military force or may cause changes in the characteristics of the region's topography and hydrography. The effects of wind, temperature, and precipitation may lead to fluctuations in water levels and currents, observation distances, or trafficability.

The various transportation and communications lines within a theater are another integral element of any assessment of the theater of operations.³³ All forms of civil and military transportation associated with the particular region are examined from the perspective of their potential impact on military operations. This part of the assessment would include an analysis of the surface conditions and weight capacity of roads, the amount of rolling stock and major depots of railways, important intersections, potential chokepoints, and possible avenues of approach for various locations within the region. Important communications networks must also be examined with particular attention to vital switching and relay points, power facilities, and operating stations. The interruption of enemy communications or possible use of existing networks by friendly forces may be an important consideration for operational planners.

The available resources of an area should also be understood in the context of their military relevancy. Valuable natural resources, vital agricultural products, or significant industrial products may be important elements in the formulation of operational objectives or of the means for obtaining those objectives. Friendly control of, or denial of enemy access to, the foodstuffs or energy resources produced by a

³³Ibid., 9-5.

given region may be the pivotal factors in determining the success or failure of a military campaign. Likewise, the targeting or capture of a strategically important industrial asset may develop as a primary means towards victory.

Finally, an understanding of the area's inhabitants may provide insights into possible threats or potential opportunities.³⁴ Factors of religion, social customs, and nationality may effect the allegiance of the local population to either friendly or enemy forces. Additionally, the plausible use of civilians for intelligence, logistical, or administrative support may be revealed through a careful examination of their sociology and collective psychology. Lastly, the inseparable links of people with their homes and society must be understood to avoid unnecessary antagonism with the local population and to realize the possible benefits of cooperation.

The second major component of operational level intelligence is the determination of the enemy military situation. An examination of basic enemy military capabilities forms the fundamental framework for this assessment.³⁵ The overall strength of enemy forces, both those directly committed in the theater and those that might be used to reinforce, is usually the starting point for an evaluation of enemy capabilities. This information is then further defined in the context of the actual composition of that force with regard to branch or arm of service, overall combat power in relation to supporting forces, and combat effectiveness of the enemy fighting units. The location and disposition of enemy units will, in turn, influence the relative strength

³⁴Ibid.

³⁵Ibid., 9-6.

and effectiveness of the enemy in more localized situations or may indicate potential vulnerabilities in the enemy's force deployment. The movement and activities of the various enemy units will be another factor effecting the general military capabilities of the opposing force. The maneuvering of enemy forces may point towards an ability to concentrate or attack while various activities such as the construction of fortifications and obstacles may improve enemy capabilities to defend a given area. Available logistics support and weapons characteristics provide other quantifiable indications of enemy military capability while assessments of enemy doctrine, tactics, training, and leadership style furnish non-quantifiable clues to the enemy's overall military potential.

However, the most important element in the analysis of the enemy situation, and usually the most difficult to determine, is the discovery of enemy intentions. While an analysis of capabilities points to the available assets of an enemy force and what these assets are capable of accomplishing, an assessment of intentions focuses on what the enemy plans to do with these assets. In the attempt to properly discern enemy intentions, it is necessary to evaluate the possible enemy courses of action with regard to the probability of their adoption by the enemy commander.³⁶ Again the doctrine, tactics, and leadership style of the enemy forces may significantly influence this decision process. Other possible methods of discerning indications of intent include analysis of the enemy commander's personality, reexamination of operational trends leading to the present situation, evaluation of the enemy's operational situation in

³⁶Ibid., 9-12.

comparison to the strategic picture, and a search for possible historical surrogates or parallels. While it may be impossible to positively know the intentions of an enemy commander, informed deductions may indicate the most likely course of action for the enemy to take. Additionally, if an operational commander takes overt actions to limit the capabilities or courses of action available to an enemy commander, the likelihood of correctly determining these intentions may be substantially increased. When presented with an assessment of probable enemy intentions, which is itself supported by an evaluation of enemy capabilities, an operational commander may then seek to capitalize on perceived enemy vulnerabilities in the development of his own plans.

One final aspect of intelligence worth consideration, but one that falls outside the traditional bounds of the intelligence definition or process, is counterintelligence. As the practical antithesis of intelligence, counterintelligence is devoted to the protection of information against collection and exploitation by the enemy's intelligence effort.³⁷ While counterintelligence may take the form of strict operational security about one's own plans, it may also involve such overt measures as misinformation and deception. In an offensive form, counterintelligence includes the planned destruction of the enemy intelligence system by the elimination of enemy collection assets, analysis facilities or command networks.

³⁷Ibid., 4-1.

C. INTELLIGENCE IN THE CIVIL WAR

The Civil War saw a substantial growth in intelligence as compared with previous American wars. While traditional methods of analysis and collection dominated military intelligence throughout the war, technological advances and new understandings of the opportunities offered by aggressive intelligence brought about changes in the field. Peculiarities inherent in the general character of this war also imposed some new requirements for intelligence in the contest.

While certain technological innovations impacted on intelligence during the Civil War, traditional military intelligence collection methods continued to play the leading role in the acquisition of operationally significant information. Such sources as accessible published materials and diplomatic intelligence supported national leaders in the development of strategic plans while the use of scouts, spies, prisoner interrogations, and captured military documents predominated in military collection efforts on the operational level. These intelligence sources had been used successfully by military commanders for hundreds of years and were still applicable in the context of 19th century military campaigns.

Published materials provided some basic elements for military intelligence although most of these would have been of strategic rather than operational value. Great military captains such as Napoleon had long relied on published works as a baseline for understanding the culture, political ideology, and broad geographical

characteristics of an enemy nation.³⁸ In the Civil War, published descriptions of a region's geography or travellers' accounts of their journeys through certain areas might provide military commanders with a basic understanding of the general characteristics of a theater of operations. Similarly, published texts by a military commander might provide some insight into how that commander would employ his forces in a given situation.

Intelligence gained by diplomatic sources was another area of collection that had long been in use. Statesmen would typically report to their home government any information or facts gathered at their foreign post which might be useful to their own nation.³⁹ During the Civil War, both the North and South made extensive use of various diplomats in Europe to promote their own political goals and to seek some special advantage from the intervention or neutrality of selected foreign nations. France and Britain were particularly active arenas of diplomatic intelligence by Union and Confederate agents. Both the North and South conducted extensive propaganda campaigns in the European press to sway the political policies of those nations and to influence popular opinion. James D. Bulloch, the Confederate Navy's chief agent in Europe, consistently reported on the operations of Union agents in Europe while Henry S. Sanford, the U.S. Minister to Belgium, was quite active in reporting the activities of Bulloch and other Confederate operatives back to Federal authorities in

³⁸Jay Luvaas, "Napoleon's Use of Intelligence: The Jenna Campaign of 1805," in Michael I. Handel, ed., Leaders and Intelligence (Totowa, New Jersey: Frank Cass & Company, Limited, 1989) 41-42.

³⁹*Ibid.*, 44.

Washington. Additionally, Sanford proved himself to be an energetic collector of information concerning the status of Confederate ship building and purchasing attempts throughout Europe.⁴⁰ While the information provided by these diplomatic representatives could prove valuable on the strategic level, it had little use to operational military commanders in the field. One exception to this generality would, of course, be the reporting of enemy ships' port visits to naval commanders which could then allow for the possible interception of these vessels by friendly warships.

On the operational level, commanders still relied primarily on scouts and spies to provide them with the majority of the information they needed regarding the enemy. In the parlance of the period, the term "scout" referred to friendly personnel, either in or out of uniform, who would make temporary probes into enemy territory to gather information or who would observe the enemy from some vantage point beyond friendly lines.⁴¹ The intrinsic speed and mobility of mounted horsemen had led military commanders of preceding ages to rely heavily on the cavalry as a primary source of information. The cavalry arm continued to provide the majority of scouts in use by field forces during the Civil War. Throughout the first two years of the war, the Confederates enjoyed a marked advantage in their use of cavalry for scouting purposes.⁴² Southern social traditions of horsemanship, better training of

⁴⁰G.J.A. O'Toole, The Encyclopedia of American Intelligence and Espionage: From the Revolution to the Present (New York: Facts On File, 1988) 122.

⁴¹Jay Luvaas, "The Role of Intelligence in the Chancellorsville Campaign, April-May, 1863" in Michael I. Handel, ed., Intelligence and Military Operations (London: Frank Cass & Company, Limited, 1990) 103.

⁴²Ibid.

cavalrymen, superior organization of cavalry assets into a coherent unified body, and superior employment of cavalry in a reconnaissance as well as combat role contributed to the superior Confederate use of these mounted soldiers as scouts.⁴³ Additionally, since most of the fighting was being done on Confederate territory, familiarity with the ground also gave a significant advantage to the Southern scouts. Because of the inherent mobility and defensive firepower of these cavalry units, commanders unhesitatingly assigned these horsemen the tasks of locating and determining the disposition of enemy forces. Civilians, using various excuses for the passage of lines and having the potential for more readily available safe havens, were also used extensively as scouts by both sides during the war.

Spies comprised the other most notable, and from a popular perception the more spectacular, source of military intelligence at the operational level. The term "spy", again in the terminology of the mid-19th century, was applied to those persons, most often civilians, who were located on a more permanent basis behind enemy lines.⁴⁴ In this vocation as well, the Confederates may have enjoyed some advantage during the opening years of the war. Widespread Confederate sympathy in the border states and Washington, D.C. allowed for a large base of potential spies that the Confederacy might exploit. Additionally, as Federal troops seized larger areas of the Confederacy, the inhabitants of these territories also provided an additional pool of spies. Although large numbers of pro-Union civilians stayed in the South after the outbreak

⁴³Ibid., 107.

⁴⁴Ibid., 102.

of the war, Federal authorities made little attempt to organize or capitalize on this potentially useful collection asset. Despite some notable success in the use of spies in and around the Confederate capital of Richmond in the early stages of the war, most Federal commanders initially ignored the potential offered by the large number of Unionists in the South. As the war progressed, however, the North also made better use of spies against their enemy. In the western theater, Federal Brig. Gen. Grenville Dodge established an extensive spy network that provided valuable information during the Vicksburg campaign of 1863.⁴⁵ Under the supervision of Brig. Gen. George H. Sharpe, spies like Elizabeth Van Lew of Richmond were also able to pass vital intelligence to Union commanders operating in the east.⁴⁶ Most effective military commanders at the operational level used spies to some extent. Drawn mainly from some element of the native population, these spies furnished basic information about enemy troop locations and movements in the immediate area. Additionally, general characteristics of an operations area or information regarding little known avenues of approach could be gained from local inhabitants.

Other traditional sources of intelligence included the interrogation of enemy prisoners of war, and the use of captured or compromised documents. Prisoners could be used to help discern enemy force structures, size, combat effectiveness, or activities. Proper exploitation and use of captured documents, though far less

⁴⁵Time-Life Books, ed., Spies, Scouts and Raiders: Irregular Operations (Alexandria, Virginia: Time-Life Books, 1985) 72-80.

⁴⁶Ibid., 80-89.

frequent, could prove to be of great significance. In the Antietam campaign of 1862, McClellan's access to Lee's Special Order Number 191, the general Confederate operational plan for the campaign, offered the potential for a decisive Union victory. Although McClellan failed to exploit this potential intelligence coup to its full potential, the case illustrates the plausible impact of these documents on the intelligence picture and ultimately on operational plans.

Various technological advances introduced new collection potentials into the intelligence arena. One of the most interesting new developments in intelligence collection was the first serious use of balloons for aerial observation.⁴⁷ Demonstrations of the potential use of balloons as observation platforms were conducted in Washington, D.C. during June 1861 by Thaddeus S.C. Lowe. On the 18th of that month, Lowe ascended over the city in a tethered balloon and, using a telegraph, wired locational data regarding the Confederate positions across the Potomac to President Lincoln. Several days later, the aeronaut used his craft above Arlington, Virginia to discern the movement of Confederate forces to the south. With the initial success of these two demonstrations, Lowe was hired by the Army to organize and manage a Balloon Corps that would operate under the Bureau of Topographic Engineers.

Eventually, Lowe procured seven balloons of various sizes and nine aeronauts to pilot the craft as the nucleus of his corps. Enlisted men from the engineers were also temporarily assigned to Lowe for the movement and maintenance of the extensive

⁴⁷Luvaas, "Chancellorsville", 108 and O'Toole, 385-388.

inflation, tethering, and transportation equipment required for the balloons. Each balloon was constructed of a double thickness of pongee, a type of glazed silk, sewn to form a near-spherical envelope and inflated with hydrogen. A large rope net covered the balloon and secured a passenger basket to the bottom of the craft. Although some free flights occurred, most ascents took place with the balloon tethered to a winch on the ground.

Other aeronauts were also active proponents of the use of balloons for military purposes. Like Lowe, James Allen had conducted some initial demonstrations of the potential for aerial observation in Washington during June but had withdrawn the proposal when his balloons were destroyed in storms later that month. John Wise, who had proposed the use of balloons for the bombardment of Vera Cruz during the Mexican-American War, was hired by the Topographic Engineers in July 1861 to map enemy positions but resigned after a command dispute with the local engineer officer. Balloonist John La Mountain ascended over Ft. Monroe, Virginia in an attempt to keep the local Federal commander informed about the dispositions of the surrounding Confederate forces and was later hired by Lowe as one of the aeronauts in the Balloon Corps.

Confederate use of balloons was much more limited, primarily because of the more finite nature of Southern resources available for this pursuit. At Richmond in 1862, the Southerners were able to construct two of the craft from the limited materials available and employed them as aerial observation platforms near Yorktown during the Peninsula campaign and closer to Richmond during the Seven Days battles. The

loss of these craft during the latter campaign basically brought Confederate military use of balloons to an end. Despite the relative lack of balloon assets and use by the South, Confederate commanders clearly recognized the potential threat caused by Federal use of these platforms and tried to avoid observation by the Federal balloons during their own movements.⁴⁸

Although there were some positive results and accurate information provided by aerial observers during the war's early campaigns, this new intelligence collection asset was never completely accepted during the war. Following the loss of the sole Confederate balloon in the summer of 1862, some Confederate leaders thought that the results provided by the reconnaissance asset were too little to justify the effort of constructing another craft. For the Union, a number of different reasons contributed to the demise of the balloon as a collection platform. Organizationally, the Federal Balloon Corps did not fit in to the existing military structure. At various times it was attached to the Bureau of Topographic Engineers, the Quartermaster Corps, and the Corps of Engineers. Continued civilian control over the Balloon Corps often brought the aeronauts into conflict with various military commanders who rarely understood the capabilities or requirements of the unit. Despite the positive use of balloons during the Chancellorsville campaign for topographic studies and the observation of enemy movements, the Union defeat in this operation helped to spell the end for

⁴⁸O.R., Vol. 5, 1079. 22 February 1862 letter from Gen. Johnston to President Davis. Also Luvaas, "Chancellorsville", 108.

Federal use of the craft.⁴⁹ The Federal commander's use of intelligence as a general scapegoat for the loss at Chancellorsville helped to bring about an end to Federal use of balloons as an intelligence collection asset.⁵⁰ Within weeks of the submission of official battle reports, which emphatically minimized the usefulness of the balloons, the corps was disbanded.

As the first American war extensively covered by the press, the Civil War also saw great use of newspapers as a tool of intelligence analysis.⁵¹ Newspapers offered potentially important information through open press reporting on enemy strengths, locations, movements, campaign plans, and battle losses in a volume that was not duplicated or as readily accessible in any other source. Prior to the start of the Chancellorsville campaign in 1862, Confederate forces were able to determine the overall size and force structure of the opposing Federal army simply through the analysis of sanitary reports and sickness ratios printed in the Northern press.⁵² In addition to the large number of newspapers in publication during the war, the comparative volume of articles reporting war related stories was also significant. During the war, about one third of the text of American newspapers was devoted to coverage of military aspects of the war.⁵³ While these reports were always of

⁴⁹Luvaas, "Chancellorsville", 108 and 112.

⁵⁰Ibid., 114.

⁵¹O'Toole, 326-328.

⁵²Luvaas, "Chancellorsville", 105.

⁵³O'Toole, 326-328.

somewhat questionable accuracy, they did provide ready access to information that might then be included in more objective and comprehensive assessments.

Although both sides in the conflict undoubtedly used newspapers to gain information about their foe, the Confederacy arguably was able to use this asset more effectively. One reason was that the North simply printed more papers and therefore provided more potential sources for Confederate collection efforts. The South had traditionally possessed fewer newspapers than the more populous North and, at the beginning of the war, held only about five percent of all paper mills in the U.S.⁵⁴ As the war progressed, dwindling resources for paper and ink further diminished the South's capability print the news. Manpower shortages for editors, printers, and reporters also contributed to the shortage of Southern papers.

In addition to the relative shortage of printed news in the South, Confederate censorship appears to have been more effective than Federal restrictions. Although some censorship of the Southern press was eased in 1863 after effective lobbying by press organizations, Confederate control remained tighter than efforts by the Federal War Department, which was constantly plagued by favoritism in the enforcement of its regulations. Also, while Federal commanders consistently had to worry about the large press corps which continually followed their armies in the field, Confederate policies excluded Southern reporters from active field operations with the army.

Access to enemy papers remained relatively easy throughout the war. The Confederate Signal and Secret Service Bureau, which was partially responsible for the

⁵⁴Ibid., 328.

analysis of Northern newspaper information on a national level, was able to obtain Baltimore papers on the same day as their issue and New York papers were received in Richmond the following day.⁵⁵ Operational military commanders habitually obtained enemy newspapers as a primary source of information when operating in enemy territory. Even private soldiers had little trouble purchasing newspapers printed in the opposing section from the various sutlers who accompanied the armies.

Many commanders undoubtedly recognized the potential use that newspapers could be to their enemies and, therefore, increased their own security measures to diminish the information leaks precipitated by "friendly" reporters. Confederate Gen. Joseph Johnston became so secretive after the leak of proposed movements in February 1862 and the ensuing suspicion that all of his plans might be revealed in the Southern press, that he thereafter refused to reveal his military plans even to President Davis.⁵⁶ Stonewall Jackson also refrained from revealing the basis of his plans to his own staff for fear some leak might occur that would reach the press. In the wake of the Gettysburg campaign, Robert E. Lee remained convinced that Federal forces had become aware of the location and disposition of Confederate forces because of some leak from the Richmond press.⁵⁷

⁵⁵Ibid., 326.

⁵⁶Freeman, 216.

⁵⁷Jay Luvaas, "Lee at Gettysburg: A General Without Intelligence" in Michael I. Handel, ed., Intelligence and Military Operations (London: Frank Cass & Company, Limited, 1990) 122.

Communications intelligence, the analysis of information received through the interception of enemy communications, also grew in importance during the war. Both armies possessed signal corps which were used as communications apparatus and observers throughout the conflict.⁵⁸ Typically, signal stations were established at easily observable points such as hilltops or in high towers and messages were relayed from one site to another using a system of semaphore flag signals. However, the ready observation of this system also meant that it could be easily intercepted by enemy signalmen. Because of the perishable nature of most information passed via semaphore flags and the relatively short range of this system, semaphore intercepts were generally of more use at the operational and tactical levels than for strategic value. The widespread use of telegraphs for the transmission of important military information also opened the way for wiretapping as a key tool in communications intelligence collection.

To combat the potential intercept of military signals, both sides often attempted to encrypt their messages. However, cryptanalysis efforts, or the breaking of these codes, also became another important development associated with intelligence during the war. Cipher disks, used as a simple means of encrypting semaphore flag signals, became standard equipment for most signalmen of the period.⁵⁹ Although these codes were usually easily broken, the rapid perishability of information transmitted by semaphore, and the difficulty of correctly intercepting and decoding these

⁵⁸Luvaas, "Chancellorsville", 104-105.

⁵⁹Spies, Scouts, and Raiders, 64.

messages under crude tactical conditions usually meant that any cryptanalysis came long after the information ceased to be useful. Telegraph signals were also widely encrypted during the war, especially as the conflict dragged on. The Federal War Department's reliance on the "Route Transportation Cipher", a word transposition and substitution system (TABLE 1), provided the Union forces with a reliable encryption code that was easy to transmit and receive but difficult to break.⁶⁰ One noticeable Confederate success in breaking this code occurred in 1864 when cryptographer Charles A. Gaston, who had been monitoring enemy communications for several weeks, intercepted a plain text Federal quartermaster report and was able masterfully to match it to other encrypted reports.⁶¹

In contrast to the effective Federal codes, the Confederates used the "Viginere System", a diplomatic or court code that had been in existence for several hundred years (TABLE 2). Based on the concept of simple letter substitution from a two-step table, this system proved both hard to transmit and receive, because its coded messages were random letter combinations rather than understandable words, and easy to break, because it relied on a one-for-one letter substitution from a table that was easily duplicated.⁶² David H. Bates, Albert B. Chandler, and Charles A. Tinker, three Federal telegraph operators, were so respected for their success in code breaking that they became known within the War Department as the "Sacred Three " of

⁶⁰Ibid., 70-71.

⁶¹Ibid., 68.

⁶²Ibid., 66-67.

cryptanalysis.⁶³ These telegraphers were able to consistently decode Confederate communications throughout the latter part of the war and provided valuable intelligence to operational commanders in the field as well as to strategic planners in Washington.

Despite the phenomenal growth of photography during the Civil War, the first American conflict to be extensively recorded in pictures, photographic intelligence remained largely undeveloped during the struggle. Although photographs were used to a limited extent to record enemy positions or in terrain studies, the problems of transporting the bulky cameras and developing equipment and the time required to process the photographs diminished the overall value of photographic intelligence during this period.

Some of the singular characteristics which typified the Civil War provided equally unique opportunities for intelligence in the conflict. Because of pre-war associations in the U.S. Army or in civilian life, many military commanders were familiar with the personalities and operating methods of their opponents. This insight into the mind of an enemy leader often allowed commanders to correctly deduce the goals, operational plans, and intentions of an opponent. The fact that both sides in the conflict also shared a generally common culture, the same language, and similar societal values also allowed for a better understanding of enemy commanders. The use of Southern slaves as potential sources of information by the North or as a means

⁶³O'Toole, 142.

of spreading misinformation by the South was a unique intelligence consideration that both sides sought to exploit during this war.⁶⁴

Civil War intelligence remained generally informal, decentralized, and elementary in its organization. While rigidly structured, centralized, and semi-autonomous intelligence organizations typically characterize modern militaries, the formation of specific intelligence staffs during this period was generally left to the discretion and imagination of various military commanders. This lack of formalized organization often led to haphazard or incomplete collection, duplication of effort, and conflicting analysis of the enemy situation within the same headquarters. During the Gettysburg campaign, the Federal commander, Gen. Meade, tried to form a unified picture of the enemy situation from the reports of five separate intelligence organizations that had overlapping responsibilities but no structured chain of command, distribution, or communications links.⁶⁵

Some attempts were made during the war, however, to formally establish more centralized organizations for the exploitation of intelligence on the national or theater level. In May 1861, Gen. George B. McClellan asked detective Allan Pinkerton to form a secret service that would provide intelligence to the Federal commander.⁶⁶ Pinkerton was the head of a private investigative service, the National Detective

⁶⁴Luvaas, "Chancellorsville", 110.

⁶⁵Luvaas, "Gettysburg", 128. During this campaign, Meade was receiving reports directly from: its own intelligence branch, the Bureau of Military Information; Pleasanton's Cavalry Corps, a subordinate unit within Meade's army; the Department of the Susquehanna; the Middle Department; and the Department of Washington.

⁶⁶O'Toole, 372-373.

Agency, and had worked closely with McClellan during the latter's employment as a railroad executive in the 1850s. Pinkerton had risen to national recognition through his exposure of the so-called "Baltimore Plot" to assassinate Abraham Lincoln during the President-elect's trip to Washington in early 1861. When McClellan was appointed head of the Union armies in November 1861, he added Pinkerton to his staff as his senior intelligence advisor. Despite later claims by the detective that his organization was the nucleus of the U.S. Secret Service, Pinkerton's unit was never a recognized part of the Federal government nor did it really act as any centralized national intelligence organization. Pinkerton's intelligence collection efforts were limited almost exclusively to the interrogation of captured Confederate prisoners and the running of a network of spies behind enemy lines in the eastern theater. The results of the detective's intelligence effort were classic examples of overestimation and the molding of an intelligence assessment to meet the preconceptions of an operational commander. Throughout the Peninsula campaign of March - August 1862, Pinkerton consistently overrated the size of the Confederate forces opposing McClellan by two to three times their actual number.⁶⁷ Similarly incorrect reports characterized Pinkerton's efforts during the Antietam campaign several months later. In fact, these reports may simply have been used to help justify the already cautious and slow moving nature of McClellan's operations. When President Lincoln finally relieved McClellan in November 1862, Pinkerton also left service with the Army and returned to his private practice.

⁶⁷Spies, Scouts, and Raiders, 32-33.

Other Federal commanders also tried to centralize their intelligence efforts. When Gen. Joseph Hooker assumed command of the Federal Army of the Potomac in January 1863, he was faced with a situation in which there were no estimates of the enemy force opposing him and no apparatus in place for gathering information about the Confederate army. To correct this obvious shortcoming, Hooker appointed Col. George H. Sharpe of the 120th New York to the position of Deputy Provost Marshal and assigned him the task of determining the size, location, and disposition of enemy forces in the area.⁶⁸ Aided by John Babcock, a former Pinkerton assistant who had stayed with the army after Pinkerton's resignation, Sharpe set about in the formation of the Bureau of Military Information, an operational level military intelligence unit that analyzed information from all available sources to develop a coherent picture of the enemy situation. Sharpe's reports during the opening phases of the Chancellorsville campaign aided Hooker in the initially successful move around the Confederate left flank.⁶⁹ The accurate daily reports of enemy size, location and movements during the Gettysburg campaign allowed the Federal commander, Gen. George G. Meade, to stay abreast of the developing situation and deploy his forces in an effective manner.⁷⁰ What made Sharpe's organization unique among most intelligence organizations of the period was its use of information from all available sources into a single, comprehensive intelligence assessment. Eventually growing to

⁶⁸Luvaas, "Chancellorsville", 101.

⁶⁹Ibid.

⁷⁰Luvaas, "Gettysburg", 119.

control over 70 civilian scouts and spies, Sharpe's bureau also drew upon vital information provided by cavalry reports, prisoner interrogations, newspapers, and communications intercepts to deduce probable enemy actions. So positive was Sharpe's reputation that Federal commanders in the western theater also requested analytical assistance from this Army of the Potomac asset, thereby making it an organization of national significance. Despite the invaluable support provided by the Bureau of Military Information during the war and the potential lessons it offered for future military intelligence, the unit was disbanded as a formal organization at the war's end.

Federal counterintelligence efforts were also largely informal during the war, although some counterespionage units were formed. Perhaps foremost among these was the National Detective Bureau, formed in 1862 by Lafayette Baker, Provost Marshal of the U.S. War Department.⁷¹ Operating almost exclusively in Washington and the surrounding area, Baker's unit consisted of counterespionage officers and detectives who were involved in criminal investigations and the disclosure of Confederate operatives in the capital.

Confederate efforts to establish any centralized national intelligence or counterintelligence organizations were far less successful. The Signal and Secret Service Bureau was established within the Adjutant and Inspector General's office of the Confederate War Department in May 1862. Under the command of Maj. William Norris, the bureau never really developed into a national military intelligence center

⁷¹O'Toole, 42-43.

but acted as more of a centralized communications facility which managed the routing of intelligence information to and from various spies operating in Canada and the North, Confederate diplomats in Europe, and the Signal Corps operating with armies in the field. The bureau was also responsible for the procurement of Northern newspapers but provided little analytical effort in discerning the truth or potential use of the information reported in those papers. Instead, this organization simply passed the papers to various political and military leaders for their own use.⁷²

Confederate counterintelligence remained equally haphazard. As the Provost Marshal of Richmond, Brig. Gen. John Henry Winder was responsible for counterintelligence and counterespionage activities in and around the Confederate capital. In this task, Winder proved himself to be particularly ineffective. Numerous spies and Federal informants continued to operate from Richmond throughout the war and, in some cases, Winder's office may have been the likely source of their information.⁷³ In a post-war discussion of her intelligence activities in Richmond, Elizabeth Van Lew claimed that she had consistently been able to baffle Winder's investigations through the simple use of charm and flattery.⁷⁴

On the operational level, most military commanders continued to manage their own intelligence efforts. During this period, military headquarters staffs were typically lean and consisted of very few specialized staff functions. While certain

⁷²Ibid., 132.

⁷³Spies, Scouts, and Raiders, 56.

⁷⁴Ibid., 87.

logistical functions were assigned to the purview of specific staff officers such as the quartermaster, chief commissariat, or ordinance officer, other duties were relegated on an ad hoc basis. Adjutants/inspectors general, aides de camp, and members of a commander's personal entourage were regularly assigned tasks as the need arose. While a commander might assign tasks to a staff officer based on some particular talent or knowledge, staff assignment typically meant that the officer had to be prepared to do a myriad of duties. Although commanders used their meager staffs to serve any number of purposes, two major ingredients of the decision making process, the intelligence and operations functions, were generally retained for consideration by the commander himself. Whereas some military leaders might be willing to accept input from subordinate commanders regarding assessments of the intelligence picture and the planning of future operations, the senior officer usually exercised the active control of both of these disciplines. While the operational commander's direct supervision of both the intelligence and operations functions in Civil War armies may have overtaxed the abilities of some commanders and led to various shortcomings, it also produced an understanding of the indivisible nature of these two factors in the decision making process.

D. INTELLIGENCE AND OPERATIONS

The analysis of the connection between "...intelligence and military operations relates to the contribution--real or potential--of intelligence to the military leader's

decisions...."⁷⁵ Logically, the relationship between intelligence and operations functions in the decision making process would appear to be firmly established. As noted previously, operations should be based on available intelligence. Similarly, "The ultimate objective of Intelligence is to enable action to be optimized."⁷⁶ In other words, operations are planned and conducted in the context of reality as reflected in the available intelligence and this intelligence, in order to be effective, must also be directed only towards those issues which are of operational significance. While phases of operations and campaigns are often governed by what the opposing commanders know about their enemies,⁷⁷ so too must the personnel who direct the intelligence effort "be kept well informed of all the latest developments concerning their own forces' operations and plans."⁷⁸ In theory then, these two factors in the determination of a proper course of action would thus appear to be inseparable, interdependent parts of a larger whole. However, the complexities of modern warfare and the separation of operations and intelligence functions into different staffing sections often points to a reality that is far removed from this theoretical deduction.

Various failings at any point in the intelligence process will limit the overall impact that intelligence will have on operational planning. Shortcomings in the execution of one phase will obviously influence the effectiveness of the other phases

⁷⁵Handel, "Intelligence and Military Operations", 1.

⁷⁶R.V. Jones, "Intelligence and Command," in Michael I. Handel, ed., Leaders and Intelligence (Totowa, New Jersey: Frank Cass & Company, 1989) 288.

⁷⁷Luvaas, "Gettysburg", 118.

⁷⁸Handel, "Intelligence and Military Operations", 1.

of the process because of the inherently cyclical nature of intelligence. Further, because of the interrelated nature of the intelligence and operations functions, any failing in the intelligence process will adversely effect the performance of the proposed operations.

One of the major problems that may occur in the planning and direction phase is that the wrong requirements will be identified or that the requirements will be incomplete. Because of this, truly important aspects of the intelligence picture may remain unexamined or efforts may be directed towards answering questions that really have little significance to the conduct of friendly operations. Similarly, some questions simply can not be answered with any degree of assurance by the intelligence assets available.

The correct identification of intelligence requirements must be the basis for the entire intelligence effort. Although operations or intelligence staff officers may have some idea of the broad requirements of needed information, commanders must ensure that they clearly spell out the elements of information that are needed to support their intentions. Otherwise, requirements that are not of significance to the operational planning may be tasked for collection, analyzed and disseminated with no potential for impact on the decision process. Another potential pitfall of the misidentification of requirements is that some key element of information would be overlooked by staff officers. Again, the direct involvement of the commander or primary operational planner may help to avoid this error.

During this phase of the intelligence process, it is equally important to discern what questions can and can't be answered by the available intelligence assets. The complexities of positively determining enemy intentions or specifically identifying all available options for an enemy commander are usually beyond the capability of any level of military intelligence but these are usually the very things that most operational planners would like to know. It is therefore important for all of the participants in the intelligence planning phase to remember that uncertainty must always become irreducible at some point.⁷⁹ This will only be possible if the operations and intelligence sections work as a single, coherent team in the development of the intelligence plan.

Several inherent problems may effect the strength and management of the collection phase. First among these is a failure to recognize the capabilities and limitations of the various collection sources. Associated with this consideration, is the fact that, when faced with the common division of intelligence and operations staff functions in modern militaries, the operations branch invariably controls the collection assets that the intelligence staff needs to fulfill its requirements. Collection assets must be managed properly to ensure their maximum effectiveness in gathering the information that will support operational plans.

All intelligence assets possess inherent limitations to the types and value of information they can collect. Communications intelligence is naturally effective only

⁷⁹Richard K. Betts, Surprise Attack: Lessons for Defense Planning (Washington, D.C.: The Brookings Institution, 1982) 102.

if enemy forces are actively using their communications networks and can therefore be intercepted. Human collectors, such as scouts or spies, must have some access to the type of information that they have been tasked to collect. Many forms of information will naturally be of limited use because of the inherent time delays in collecting the information and then transmitting that information back to a processing point for analysis by a commander, operational planner, or intelligence advisor.

While operations staffs traditionally control the assets, personnel, and equipment that are required for the collection of intelligence information, these staffs must understand the importance of the required information and the capability of a source to gather that information. While a commander may task his intelligence advisor with specific informational needs, only the operations staff has the capability of gathering this information. While operational necessities may require that certain assets would not be used, these decisions need to be made with the understanding that some information may therefore not be available for use in operational planning. As in the intelligence planning phase, the commander, intelligence, and operations sections must understand the priority of operational concerns and work as one to maximize the collection potential of available assets.

In the processing and analysis phase, numerous potential pitfalls may inhibit the contribution of intelligence to the leader's decisions. The most obvious of these is that the analysis will be wrong in its conclusions. Incomplete analysis or analysis that really fails to address one of the commander's requirements is another threat to the maintenance of a positive bond between intelligence and operational planning.

The most fundamental quality that will influence the impact of intelligence analysis on operational planning is its accuracy. If false or incorrect assessments are acted upon by commanders, intelligence will invariably have a negative effect and could even lead to the failure of the proposed operation. "...A commander's belief in the credibility of intelligence provided is probably the most essential factor in his readiness to make use of it."⁸⁰ If the analysis provided by an intelligence staff is consistently wrong, commanders and operational planners will eventually ignore these assessments in the development of operational plans, thereby leading to a situation in which intelligence has no significance towards the decision process.

Incomplete analysis or analysis that fails to address key operational concerns may also fail to have an influence on the decision making process. For analysis to be effective, it must convey to a commander or operational planner the importance of a given set of facts. Without this operational relevancy, analysis is of little value. Similarly, if a key piece of analysis is absent from an assessment, it may also be of little value. Intelligence staffs must always address the primary operational concerns of the commander in their assessments. While the inclusion of other significant analysis may improve the positive influence of intelligence on the decision making process, this analysis is useful only if the commander's principal requirements have been satisfied as well.

Numerous factors may present themselves as potential obstacles to efficient analysis. Time, objectivity, the amount of detail required, and the desire for positive

⁸⁰Handel, "Intelligence and Military Operations", 51.

conclusions will all influence the effectiveness of the analysis phase. The time required to perform proper analysis is often much greater than that allowed in a period of crises in which the dynamics of decision making and data accumulation outpace intellectual refinements.⁸¹ When faced with a forceful or charismatic commander, analysts may be swayed in their objectivity and may then tell a commander what he wants to hear rather than assessments supported by facts and a logical flow of thought.⁸² Finally, a commander's desire for positive assurances from analysis that is designed to "...reduce uncertainty by extrapolating from evidence riddled with ambiguities"⁸³ will also have a profound effect on the overall intelligence effort. While operational planners might be best served by assessments that were undeniable in their accuracy, analysis is more typically characterized by the Clausewitzian reality that "In war, more than anywhere else, things do not turn out as we expect."⁸⁴

Misdirected, exclusive, or untimely dissemination will further limit the impact of intelligence on operations. Equally detrimental is the dissemination of intelligence in a form not readily useable by an operational planner. Late, infrequent, or misdirected dissemination of intelligence might force a commander to make decisions without use of the assessments provided in these products. Dissemination of

⁸¹Betts, 102.

⁸²Jones, "Intelligence and Command", 291.

⁸³Betts, 102.

⁸⁴Clausewitz, 193.

intelligence on too frequent a basis may lead operational commanders to discount the assessments as being alarmist⁸⁵ or may also desensitize decision makers to the potential threats or opportunities suggested by these assessments.⁸⁶ Dissemination of intelligence in a form that is neither understandable nor useable by an operational commander could also negate any potential impact of intelligence on operations. The key to the proper form of dissemination is "...to paint the picture in a style that will best convey its intended content to the commander."⁸⁷ This, in turn, would demand a proper understanding of operational command and planning considerations by intelligence analysts and advisors.

Finally, one of the most damaging factors in the intelligence process' failure to support operations is the failure of the commander or operational planner to include intelligence assessments in the operational planning process. This problem might be the result of any number of diverse causal elements. Obviously, shortcomings in any of the previous phases of the intelligence process would influence a commander's willingness or ability to use intelligence assessments in the formulation of operational plans. Intelligence will be used in the development of operational plans only if proper requirements have been identified, suitable information collected, correct analysis performed, and completed assessments transmitted to the commander. If the successful achievement of some goal obsesses an operational planner, even accurate

⁸⁵Betts, 97.

⁸⁶Ibid., 100.

⁸⁷Jones, "Intelligence and Command", 293.

intelligence may fail to influence the decision process. "If a leader is dogmatic, he will not be receptive to new information or information that contradicts his objectives and earlier policies and decisions."⁸⁸ Instead, these commanders may simply refuse to accept the assessments provided and may therefore fail to include any intelligence in the formation of operational plans. Additionally, second stage intelligence, that assesses enemy reactions to friendly operations, may be unacceptable to commanders if positive or desired results are not noted in the intelligence reports.⁸⁹ Due to the inherently uncertain and sometimes ambiguous nature of intelligence reports, some commanders prefer to be given information only and conduct all analysis themselves. While this method may work effectively in some cases, commanders must be willing to accept assessments in fields that they know nothing about. Further, the volume of information and speed of communications which characterize modern military campaigns may quickly overload a commander's mind with seemingly unconnected details that might actually be the keys to a comprehensive analysis of the situation. To ensure the inclusion of intelligence in the decision making process, a commander must remain convinced that his use of the analysis provided by intelligence will increase the effectiveness of his operational plans and will also raise the probability of success.

⁸⁸Handel, "Leaders and Intelligence", 5.

⁸⁹Ibid., 9.

One of the obvious characteristics of the intelligence relation to operations is the fact that even "...the best intelligence alone is no panacea."⁹⁰ Good intelligence, in and of itself, can not win campaigns. Other ingredients in the operational picture will have to be present to ensure military success. Sufficient manpower, firepower, and logistical support as well as effective leadership and combat styles are all necessary ingredients for victory. Therefore, "Intelligence, perhaps even more so than any other factor in war, is valuable only if many other conditions are met."⁹¹

Commanders use intelligence as a means of recognizing opportunities and threats to their operational planning. While unquestionable numerical superiority or the supremacy of certain weapons may make the outcome of war more certain, intelligence offers a way of maximizing the potential benefits of these assets. Conversely, use of intelligence by a weaker opponent may negate some of the advantages held by the stronger side. Although "...excellent generalship and highly motivated soldiers can temporarily substitute for good intelligence,"⁹² the competent combination of intelligence and operational planning may increase the overall effectiveness of military operations.

However, it is important to remember that the successful execution of operations must remain the central focus of all military decisions. Intelligence is important only in the sense that it provides another tool for achieving operational goals.

⁹⁰Handel, "Intelligence and Military Operations", 33.

⁹¹Ibid., 43.

⁹²Handel, "Leaders and Intelligence", 19.

"...Intelligence, like logistics, should always play a supportive role; yet the word supportive as used here is not synonymous with secondary or unimportant."⁹³ The indivisible relationship of operations and intelligence is similar to any goal and the means of achieving it. Only when the two fields are closely linked can operational plans be developed to their maximum potential.

⁹³Ibid., 21.

THE ROUTE TRANSPORTATION CIPHER⁴

(TABLE 1)

are	Valley	the	reinforcements	sufficient	too
	[church]		[civilians]		
forces	for	in	be	that	scattered
present	a	massing	sent	request	to
my	possible	are	to	therefore	form
Washington	offensive	troops	this	I	an
[south]					
towards	march	enemy	district	deterrent	effective
		CAIRO			

METHODOLOGY:

A keying word would be selected from a cipher book to indicate the number of columns and rows used in the table and the starting point for the message. The text would then be organized in the table according to a predetermined route established by the keying word. Sensitive words listed in the cipher book would be substituted by alternates. Using the keying word as the first word in the transmission, the message would then be sent as it read from left to right and top to bottom within the table. Decryption would simply reverse the process.

EXAMPLE:

Plain text message- Enemy troops are massing in the Valley for a possible offensive march towards Washington. My present forces are too scattered to form an effective deterrent. I therefore request that sufficient reinforcements be sent to this district.

Encryption process- The keying word CAIRO indicates a table of six columns and six rows with the starting point of the message being the bottom of the third column and travelling up the third column, down the second, etc. Words would then be inserted in the table substituting the words in brackets for the sensitive words above them. The message would then be transmitted as it read from left to right, top to bottom.

Encrypted message- CAIRO, are church the civilians sufficient too forces for in be that scattered present a massing sent request to my possible are to therefore form south offensive troops this I an towards march enemy district deterrent effective.

⁴Spies, Scouts, and Raiders, 70-71.

THE VIGINERE ENCRYPTION SYSTEM²⁶ (TABLE 2)

Message letter axis

Key
letter
axis

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	A
C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	A	B
D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	A	B	C
E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	A	B	C	D
F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	A	B	C	D	E
G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	A	B	C	D	E	F
H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	A	B	C	D	E	F	G
I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	A	B	C	D	E	F	G	H
J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	A	B	C	D	E	F	G	H	I
K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	A	B	C	D	E	F	G	H	I	J
L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	A	B	C	D	E	F	G	H	I	J	K
M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	A	B	C	D	E	F	G	H	I	J	K	L
N	O	P	Q	R	S	T	U	V	W	X	Y	Z	A	B	C	D	E	F	G	H	I	J	K	L	M
O	P	Q	R	S	T	U	V	W	X	Y	Z	A	B	C	D	E	F	G	H	I	J	K	L	M	N
P	Q	R	S	T	U	V	W	X	Y	Z	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Q	R	S	T	U	V	W	X	Y	Z	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
R	S	T	U	V	W	X	Y	Z	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
S	T	U	V	W	X	Y	Z	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
T	U	V	W	X	Y	Z	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
U	V	W	X	Y	Z	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
V	W	X	Y	Z	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
W	X	Y	Z	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
X	Y	Z	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W
Y	Z	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X
Z	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y

METHODOLOGY:

Letters from a plain text message were matched to the letters of an encryption keying phrase. These two letters were then assigned to the different axis of the table above and, where the two lines intersected, a new letter was substituted for transmission in place of the plain text message.

EXAMPLE:

Message-	S E N D	P O N T O O N	B R I D G E S	F O R W A R D
Key-	C O M P	L E T E V I C	T O R Y C O M	P L E T E V I
Code-	U S Z S	A S G X J W P	U F Z B I S E	U Z V P E M L

²⁶Ibid., 66.

II. WINTER EXPEDITIONS

A. JACKSON AND THE VALLEY

On 28 October 1862, the Confederate War Department issued Special Order Number 192, assigning command of the Shenandoah Valley District to Maj. Gen. Thomas Jonathan Jackson.⁹⁶ The senior commander of the Confederate Army of the Potomac, Gen. Joseph Johnston, was initially hesitant to transfer this promising subordinate from his own operational command at Manassas but the strategic importance of the Valley and Jackson's proven military abilities soon led Johnston to conclude that the appointment was appropriate. Johnston, in his role as the commander of the Department of Northern Virginia, would still exercise authority over the subordinate district commander but Jackson would now be allowed a greater degree of operational independence. By 4 November, Johnston had notified Jackson of the new assignment and the junior general made immediate preparations to assume his duties. In a short speech delivered at Fairfax Courthouse, Jackson bade farewell to his former command, the "Stonewall" Brigade, the unit with which he had gained fame at Manassas and whose sobriquet he shared. He then boarded the first available train leaving Manassas for the Shenandoah Valley and arrived in the town of Winchester that same evening.⁹⁷

⁹⁶O.R., Vol. 5, 930. Adjutant and Inspector General's Office Special Order Number 192, issued at Richmond.

⁹⁷Ibid., 937. 5 November letter from Jackson to Secretary of War, J.P. Benjamin.

Jackson was a stranger to neither the area of his new assignment nor to military life. A native Virginian, Jackson had been born in 1824 in the town of Clarksburg, a rough little village located in the mountainous western region of the state.⁹⁸ Following the deaths of their father in 1826 and mother in 1831,⁹⁹ Thomas and the other Jackson children were raised by various relatives in the region. In 1842, Jackson was presented with an unexpected opportunity.¹⁰⁰ Through the resignation of a locally appointed cadet and the influence of some long standing friends of the family, the enterprising young man secured an appointment to the U.S. Military Academy and reported for duty that June. Despite the fact that he had only the equivalent of a fourth grade education, Jackson diligently applied himself to his studies and graduated 17th of 59 cadets in the class of 1846.¹⁰¹

With the U.S. at war with Mexico, Jackson soon found himself in the thick of military action. Assigned to Company K of the 1st Artillery,¹⁰² the young officer first saw action during the siege of Vera Cruz and was promoted to 1st Lieutenant for his courage under fire.¹⁰³ Subsequent combat included the assaults on Churubusco,

⁹⁸Clark, 22.

⁹⁹Frank E. Vandiver, Mighty Stonewall (College Station, Texas: Texas A&M University Press, 1988) 3.

¹⁰⁰Ibid., 12.

¹⁰¹Clark, 25.

¹⁰²Vandiver, 20.

¹⁰³Clark, 21.

Chapultepec, and the San Cosme Gate during Scott's campaign against Mexico City.¹⁰⁴ Conspicuous throughout each of these actions, Jackson rose to the rank of Brevet Major before the war's end.

Like many Mexican War veterans, however, Jackson found the peacetime Army far less satisfying. Following an uneventful two-year assignment with the garrison at Fort Hamilton, New York,¹⁰⁵ Jackson was ordered to Fort Meade, Florida, in October 1850 as part of the move to suppress hostilities during the Third Seminole War.¹⁰⁶ After a lingering and bitter personal feud with the post commander, Jackson decided to leave the Army.¹⁰⁷ In August 1851, Jackson resigned his Army commission and accepted a position as an instructor at the Virginia Military Institute in Lexington, Virginia.

Although his students often characterized him as an uninspiring martinet, Professor Jackson sought to establish himself as an upstanding member of the Lexington community. He bought a small house in town and became an active member of the local Presbyterian congregation. In August 1853, Jackson married Elinor Junkin, a minister's daughter, but his young wife died 14 months later.¹⁰⁸ Following a pleasure trip to Europe in the summer of 1856, Jackson began courting

¹⁰⁴Vandiver, 27-43.

¹⁰⁵Ibid., 47.

¹⁰⁶Clark, 26.

¹⁰⁷Ibid., 26-29.

¹⁰⁸Vandiver, 104.

Mary Anna Morrison of North Carolina, another minister's daughter, and the two were married in July 1857.

With the outbreak of the Civil War in 1861, Jackson returned to military life. In April he led a group of VMI cadets to Richmond to serve as drill masters for the growing number of Confederate volunteers around the city and was himself soon appointed to command the garrison at Harper's Ferry with the rank of Colonel.¹⁰⁹ At this new post Jackson began to show many of the qualities that would characterize his future performance in the war. The raw militia and volunteer troops that formed his command were subjected to endless drill and military exercises to improve their proficiency and discipline. Then, in May Jackson seized the operational initiative in the area with a raid against the Baltimore and Ohio Railroad, an important supply route for goods travelling to Washington from the west. By simply closing off both ends of a 32 mile section of track for a single day, the Confederate commander captured huge amounts of Federal supplies and rolling stock that included over 56 locomotives and 300 cars.¹¹⁰

After turning command of Harper's Ferry over to Gen. Joseph Johnston on 24 May, Jackson was assigned the command of the First Brigade in Johnston's recently formed Army of the Shenandoah.¹¹¹ Along with this new command came a promotion to

¹⁰⁹Ibid., 135.

¹¹⁰Clark, 35.

¹¹¹Vandiver, 143.

Brig. Gen. in mid-June.¹¹² At the battle of Manassas in July, Jackson's stubborn defense of Henry House Hill earned the nickname of "Stonewall" for both himself and his brigade of five Virginia regiments and marked the commencement of Jackson's rise to prominence in the Confederate army. It was largely because of his performance at Manassas that he was promoted to Maj. Gen. in October and subsequently assigned to the Valley.

With his headquarters formally established in Winchester, Jackson began to assess the state of military affairs in his district. The Confederate military forces that Jackson had available for his own use were weak. The only Southern military assets under Jackson's immediate control were 1461 militiamen loosely organized in three brigades, three field artillery pieces, and 130 mounted militia. An additional force of 485 infantry and 60 cavalry were also within the boundaries of the district but, because of a unique command relationship wherein these units reported directly to the War Department, Jackson was initially unsure whether his authority extended over these troops.

The Federal forces opposing Jackson's meager command were considerable. From an escaped Confederate prisoner, the Southern general learned that 1200 Union soldiers were positioned in Williamsport and might be preparing to cross the Potomac River as soon as it was fordable. Lt. Col. Turner Ashby of the cavalry reported 800 Northern troops near Shepardstown with the possibility that reinforcements had been moving in that direction. Scouts near Romney had reported 4000 Federal troops under

¹¹²Freeman, 41.

Gen. Kelley in possession of that town and that this force might be preparing for an advance on Winchester.¹¹³ The Confederates would have to improve their own circumstances if they were to hope for success against the Federals.

In addition to the enemy forces, Jackson also had to consider the physical characteristics of his area of operations during the development of any plans (MAP 1). The district to which Jackson had been assigned was an area whose strategic importance would become apparent as the war continued. Located between the heights of the Blue Ridge and Allegheny Mountains in western Virginia, the Shenandoah Valley was one of the most significant geographic features of the eastern theater of war. Stretching from the James River in the south to the Potomac River in the north with an average width of about 40 miles, the Valley District encompassed a vast area of several thousand square miles that Jackson was now tasked with defending.¹¹⁴

The two mountain ridges, parts of the Appalachian chain, that bounded the district on the east and west were major barriers that separated the Valley both physically and culturally from other parts of the state. The eastern boundary of the Valley was formed by the Blue Ridge. This feature formed a natural barrier between the Valley and the eastern part of the state that helped to underscore the district's physical differences from the tidewater and piedmont. While much of the land east of the

¹¹³O.R., Vol. 5, 937. 5 November letter from Jackson to Benjamin.

¹¹⁴Freeman, 678. Footnoted M.F. Maury, Physical Survey of Virginia, Preliminary Report No. 2, 97-98.

Blue Ridge was characterized by tangled forests and worn out farmland, the Valley had woods with little undergrowth¹¹⁵ and rich soil in its fields. Numerous gaps, most of which could be held against any frontal assault by a single cavalry regiment and a field battery, passed through the Blue Ridge and were important choke points on any east-west routes to or from the Valley.¹¹⁶ In the west, the Alleghennies separated the Valley from the mountainous pro-Union counties that were to secede from the rest of the state and become West Virginia. The geography of the Valley itself reflected the mountainous character of the greater region. "Drained by the Shenandoah with its numerous affluents the surface is nowhere flat, but a succession of graceful swells, occasionally rising into abrupt hills."¹¹⁷ The headwaters of the Shenandoah River began about 18 miles south of Staunton and then, after uniting its various branches and forks, flowed to Harper's Ferry where it joined the Potomac. Numerous hills and ridges were scattered throughout the Valley and thereby served to subdivide the district into smaller compartments. "But the glory of the Valley is the Massanutten,"¹¹⁸ a 60-mile long series of low, but steep, mountains in the east central part of the district that actually separated the greater Shenandoah Valley area into two distinct valleys. While the western part continued to use the name Shenandoah, the eastern division was known as the Luray Valley. The obstacles to

¹¹⁵Ibid., 679.

¹¹⁶Ibid., 690.

¹¹⁷Richard Taylor, Destruction and Reconstruction (D. Appleton and Company, 1879. reprint, New York: Bantam Books, 1992) 43.

¹¹⁸Ibid., 45.

both movement and observation provided by the Massanutten would play a key role in the upcoming campaign.

While the natural geography of the Shenandoah region offered some unique considerations for the conduct of military operations, certain man-made features would also influence planning within the district. Transportation networks, population centers, and production efforts were all factors that had to be examined by military commanders in the area. The character of the local inhabitants themselves was another element in the makeup of the district that suggested examination.

The transportation networks that existed in the Valley were a major area of concern. Although the geography of the Valley suggested its use as a natural north-south axis of movement for the opposing armies, this movement could only be made if the existing transportation systems were also suitable for such an endeavor. Infantry and cavalry soldiers might be able to march cross-country over the fields and forests of the district but less mobile assets such as artillery and supply trains would have to rely on the use of roads and railroads.

The most significant characteristic of the railroads in the district was the absence of any continuous line down the Valley.¹¹⁹ The Baltimore and Ohio Railroad transitted across the lower Valley near Harper's Ferry and linked Washington to the west. Because of its east-west orientation, the B&O offered little support for forces moving up or down the Valley. Although it might serve as a means of moving units to the district from some other region, its location so close to the opposing armies

¹¹⁹Freeman, 681-682.

meant that neither side could use it effectively unless large numbers of troops were allocated for its protection. The Winchester and Potomac line, which ran the 32 miles between Winchester and Harper's Ferry, offered some use as a means of limited north-south movement but, like the B&O, its position in the lower Valley also left it in contention between the belligerents. The Winchester and Potomac's use of light weight rails and sleeper ties also restricted the weight of loads it could carry.¹²⁰ The Manassas Gap Railroad ran 77 miles from Mt. Jackson, through Strasburg and Thoroughfare Gap, to Manassas Junction, east of the Blue Ridge. In the upper Valley, the Virginia Central ran through Staunton from Charlottesville to the east then continued southwest toward the Allegheny range. Like the other lines, it could primarily be used as a means of moving supplies and men to or from other regions.

Roads formed the other major transportation network in the district. In contrast to the railroads of the region, roads of varying quality were so numerous that local inhabitants sometimes had difficulty remembering where each of the tracks led. In many cases several roads might simply link the same two endpoints but take different routes to get there. To further complicate military planning, the roads of the region were not only confusingly numerous but were also largely unmapped.¹²¹

While most roads throughout Virginia remained unimproved dirt tracks, the abundance of limestone in the Valley had allowed for the construction of improved

¹²⁰Ibid., 681. While standard rail weights for the period were 50 pounds per yard, the Winchester and Potomac relied on rails that weighed only 16 and 1/2 pounds per yard.

¹²¹Ibid., 685.

surface thoroughfares that could support heavy traffic in any weather. The macadamized Valley Turnpike was the major north-south line of communication throughout the region. Other macadamized byways served to link the turnpike with various towns throughout the Valley. Although these "metaled" roads provided a solid marching surface, the majority of the roads in the Valley remained simple dirt routes. Like the unimproved roads throughout most of Virginia, "their badness was a joke when they were at their best and a calamity when they were at their worst."¹²² From November to April, rain and snow generally made most of these roads impassable unless they became frozen and the hot, dry summers left them dusty, choking byways.¹²³

Travelling the length of the Shenandoah Valley from Staunton to Martinsburg, the Valley Turnpike was perhaps the most significant avenue of advance for any force operating in the region. Its improved surface and resulting all-weather capability allowed for the rapid movement of armies at any time of year. The overall quality of the road also made it an ideal route for the movement of heavily laden supply wagons and other weighty equipment. So stable was this roadbed that, during the course of the war, Confederate forces dragged captured locomotives along its surface without doing substantial damage to either the train or the thoroughfare. The turnpike's proximity to or routing through many of the larger towns in the district

¹²²Ibid., 684.

¹²³Ibid., 685.

was another factor that contributed to its value as an important line of communication.

Other roads in the Valley were also of significance in military planning. The Staunton-Parkersburg turnpike in the upper Valley was an important route which linked the Valley with the regions west of the Alleghennies.¹²⁴ Roads of differing quality also passed through each of the gaps in the Blue Ridge, thereby providing access to eastern Virginia. The rough parallelogram formed by roads surrounding and crossing the Massanutten would be among the most significant aspects of the road network in the Valley.¹²⁵ While the Valley turnpike ran along the western base, an inferior road passed along the length of the Luray Valley to the east. Unimproved roads also linked the towns at the north and south ends of the Massanutten while a single track traversed its heights between New Market and Luray.

Although the towns of the district were often nothing more than small country villages, their location at the intersection or terminus of various roads or rail lines often gave them a significance they would not otherwise have held. Harper's Ferry, located at the confluence of the Potomac and Shenandoah Rivers in the lower Valley, had been the site of a major U.S. arsenal and was also an important rail center. Winchester was a sizeable community important as a major road intersection and railroad terminus. Strasburg, at the northwest end of the Massanutten, could, in conjunction with Front Royal on the northeast side of the Massanutten, be a

¹²⁴Ibid., 690.

¹²⁵Ibid., 332.

significant defensive point along the Manassas Gap Railroad. New Market and Luray, as previously noted, were the endpoints of the road traversing the Massanutten and were the approximate midpoints on each side of that mountain obstacle. Farther south, Staunton was a sizeable community whose location along both the Virginia Central Railroad and the Staunton-Parkersburg Turnpike made it a vital point of defense for the east-west supply line to Richmond. At the upper end of the Valley, Lexington was a prosperous community which served as home to the Virginia Military Institute.

The Valley's inhabitants themselves were an important consideration for military commanders on both sides of the conflict. Like civilians in any Civil War, their loyalties were often divided by competing interests and they often found themselves trapped between the warring factions. Many were descendants of German immigrants who had prospered in the fertile lands of the region. "These were thrifty, substantial farmers, and, like their kinsmen of Pennsylvania, expressed their opulence in huge barns and fat cattle."¹²⁶ A large minority were pacifist Mennonites and Dunkards, a quiet, religious people who worked diligently to improve their blessed land. Unlike other areas of the South, there were no great planters and few slaves, no conspicuously wealthy families and likewise little poverty.¹²⁷ Most of the population remained supportive of the Confederacy, more for reasons of local loyalty rather than ideology, and many of the men joined the Confederate army or militia.

¹²⁶Taylor, 45.

¹²⁷Clark, 8-9.

One Confederate general noted that, aside from the significant passivist population, "The women sent husbands, sons, lovers to battle as cheerfully as to marriage feasts."¹²⁸

The various goods that were produced by these industrious people gave the Valley even more significance than its strict geographical setting. Agriculturally, the region was unsurpassed. Farms were prosperous and efficiently run. Gen. Richard Taylor recalled that:

At that time everything in the valley had a thrifty look, the horses and cattle were fat and sleek, the large barns overflowing with the gathered crops, the houses which were small in comparison with the barns, looked comfortable, the fences, post and rail or stone, were in splendid order; in fact everything looked well, and showed a thriving population. It was truly a land of milk and honey.¹²⁹

The Valley, "...that great place of wheat, flour, and hogs....",¹³⁰ was the most productive area in Virginia both for cattle and grain.¹³¹ Its fields produced wheat at twice the yield of farmland in other parts of the state¹³² and the livestock always appeared to be healthy and well fed. In the early stages of the war, the Confederate troops stationed in the Valley took full advantage of the fruits of this agricultural

¹²⁸Taylor, 45.

¹²⁹John H. Worsham, One of Jackson's Foot Cavalry (Neale Publishing Company, 1912. reprint, New York: Bantam Books, 1992) 42.

¹³⁰Ibid., 37.

¹³¹Freeman, 691.

¹³²Clark, 9.

wealth. One Southern soldier stated that "In going down the valley, we had a feast all the way; the people had just finished killing hogs, and every house had sausage, spare ribs, chine, liver, etc., to give us."¹³³ An abundant region such as the Valley would be a great subsistence asset to any military force that controlled it.

Although most commercial enterprises remained relatively small, manufactured goods were another important asset to the region's productivity. Capture of the precious rifle manufacturing machinery located in the U.S. arsenal at Harper's Ferry had been a major objective of Virginia officials during the opening days of the conflict.¹³⁴ The numerous streams and rivers throughout the district provided an ample power supply for the many textile factories and grain mills in the Valley.¹³⁵ The presence of iron ore, coal, and timber allowed for the establishment of various small pig iron furnaces. The limestone underlying most of the district's terrain was extensively quarried and used for road surfacing.

An area as vast and important as the Valley would require a much larger military force for its protection than Jackson possessed in early November, 1861. Soon after his arrival in Winchester, Jackson had sent a plea for reinforcements to the Confederate War Department in Richmond and, on 7 November, Secretary of War Benjamin transmitted a favorable reply.¹³⁶ The Stonewall Brigade and a company

¹³³Worsham, 42.

¹³⁴Freeman, 691.

¹³⁵Clark, 9.

¹³⁶O.R., Vol.5, 937. 5 November 1861 letter from Jackson to Benjamin.

of the Rockbridge artillery were to be detached from Johnston's army and sent to the Valley District.¹³⁷ Gen. Johnston, still somewhat miffed about Jackson's departure, objected to the removal of the veteran Stonewall Brigade from the Confederate Army of the Potomac¹³⁸ but Secretary Benjamin and President Davis, pointing to the urgent need for troops in the Valley, overruled this objection. Jackson's familiarity with the unit and the fact that many of the troops in this brigade were drawn from, and therefore familiar with, the district were other positive factors influencing the decision.¹³⁹ A force of about 6,000 men was also to be detached from Brig. Gen. Loring's Army of the Northwest, which was then operating in the Alleghennies, and sent to Winchester, via Staunton.¹⁴⁰ As an additional measure to increase the size of his developing army, Jackson then issued another call for mobilization of the district's militia.¹⁴¹ However, because of Federal occupation of areas within the district, Jackson expected this call to yield few new recruits.

In accordance with Benjamin's instructions, the Stonewall Brigade set out from Fairfax Courthouse towards the railroad depot at Manassas on the 8th.¹⁴² The next

¹³⁷Ibid., 939. 6 November letter from Benjamin to Jackson.

¹³⁸Ibid., 940. 7 November letter from Johnston to Cooper.

¹³⁹Ibid., 946. 10 November letter from Davis to Johnston. Also 940, 7 November letter from Benjamin to Johnston.

¹⁴⁰Ibid., 938. 5 November order from Gen. Cooper, Adjutant and Inspector General of the Confederate army, to Brig. Gen. Loring.

¹⁴¹Ibid., 942. 7 November report from Jackson to Maj. T.G. Rhett, Assistant Adjutant General of the Confederate Army of the Potomac.

¹⁴²Ibid., 944. Army of the Potomac, Special Order Number 500.

day the troops boarded the cars and travelled to Strasburg where they debarked for the march to Winchester, which they reached by the 11th.¹⁴³ Jackson continued to train and arm the militia forces and quickly enfolded new recruits into the existing units. Although Loring's troops had yet to arrive, Jackson already began to plan for the use of the growing Confederate military force in the Valley.

B. OPERATIONS ALONG THE POTOMAC

With the overall size and quality of his little army improving, Jackson now made plans to go on the offensive against the still larger Union forces in the area. In a 20 November message to Secretary Benjamin, Jackson proposed an attack against the Federal force in Romney.¹⁴⁴ The Confederate general had several reasons for suggesting such an operation. Jackson reasoned that the Union commanders in that area were probably not expecting an attack during the winter months and that their guard would therefore be somewhat relaxed. If the Southerners waited until spring to attack the area, this would allow the Northern troops to prepare formidable defenses and would also prevent Confederate access to the needed resources around Romney. Further, Jackson believed that a Confederate advance on Romney might cause Gen. McClellan, the commander of the Federal Army of the Potomac, to believe that Johnston's army had been substantially weakened and thereby induce the Federals into a hasty assault against the formidable Confederate defenses near

¹⁴³Robert E. Denney, The Civil War Years: A Day-by-Day Chronicle of the Life of a Nation (New York: Sterling Publishing Co., Inc., 1992) 96.

¹⁴⁴O.R., Vol. 5, 965.

Centreville. Jackson might then take his force from the Valley and fall upon the right or rear of McClellan's army.

Various delays, however, were hindering the movement of Loring's command to Winchester. Brig. Gen. Loring himself seemed less than enthusiastic about the proposed junction with Jackson and had suggested that, due to the vigors of previous operations in the Alleghennies, his entire force should be allowed to rest and refit during the winter rather than continue active field operations. On 21 November, however, Gen. Johnston urged the War Department to order Loring's force to Winchester instead of allowing them to simply go into winter quarters.¹⁴⁵ Confederate manpower was too precious to let Loring's troops remain idle for several months. On the 24th, Secretary Benjamin sent a letter to Loring outlining the benefits of a union between the two Confederate forces, but still left much discretion to Loring as to whether or not any junction should take place.¹⁴⁶ Although the brigadier agreed to march his troops to Winchester, he continued to delay the movement, offering a variety of reasons for his tardiness.¹⁴⁷ Finally, on 4 December, Inspector General Cooper issued Loring a peremptory order to send Taliaferro's brigade to Winchester.¹⁴⁸ This, in turn, was followed the next day by an order for Loring to

¹⁴⁵Ibid., 966.

¹⁴⁶Ibid., 969.

¹⁴⁷Ibid., 983. 29 November letter from Loring to Benjamin.

¹⁴⁸Ibid., 980.

move his entire command from Staunton to Winchester.¹⁴⁹ Although Taliaferro's unit arrived in Winchester several days after these orders were issued, the rest of Loring's command would not reach the town until the middle of the month.¹⁵⁰

The delays in concentrating a sufficient force for an advance on Romney had caused Jackson to modify his plans. Federal reinforcements had been moving towards Romney since November and Jackson now believed that up to 9,000 Northern soldiers, under the command of Gen. Kelley, were located around the town.¹⁵¹ The Confederate general now thought that an expedition against the Chesapeake and Ohio Canal, a major transportation route along the Potomac River for the shipment of supplies to Washington from the west, might be more favorable than an immediate attack against the sizeable enemy force at Romney (MAP 2). Coal was a particularly important commodity that typically travelled via the canal to Washington. Although Jackson realized that he would still have to maintain a watch on Kelley and other Federal forces in the area, he also reasoned that, if sufficient damage could be done to the canal, "...Washington will hardly get any further supply of coal during the war from Cumberland...."¹⁵²

¹⁴⁹Ibid., 982.

¹⁵⁰Ibid., 389. Jackson.

¹⁵¹Ibid., 396. 16 December letter from Jackson to Johnston.

¹⁵²Ibid. Jackson to Johnston, 14 December.

On 16 December, Jackson initiated his plan "...to cut off western supplies by breaking Dam No. 5."¹⁵³ Confederate cavalry, under Lt. Col. Ashby rode to the vicinity of the dam to reconnoiter Union positions and to screen Jackson's movement. The Stonewall Brigade left its camp at Winchester and marched the 15 miles northeast to Martinsburg. After leaving its baggage at Big Springs, the unit then travelled an additional 13 miles to the southern bluffs overlooking Dam No. 5 on the Potomac. Throughout the night of the 16th and most of the 17th, the Confederate troops huddled in their blankets to fight the effects of the bitter cold that had recently arrived. As night fell on the 17th, "...Capt R.T. Colston, Company E, Second Regiment Virginia Volunteers, who was well acquainted with the locality of the dam and its structure, volunteered to take charge of the working party to accomplish the desired object."¹⁵⁴ Using picks, shovels, and crowbars, Colston's party of about 20 men descended into the cold water and began dismantling a section of the structure.

While the Stonewall Brigade and much of Ashby's cavalry were employed near Dam No. 5, Carson's militia brigade had also marched north from Winchester and made a demonstration towards Falling Waters and Williamsport to distract the Federal forces in the area.¹⁵⁵ Jackson knew that the Union had been forming a substantial force on the Maryland side of the Potomac and that its intervention could wreck the raid against the canal. Carson's presence would help to confuse the Federal

¹⁵³Ibid., 390. Jackson.

¹⁵⁴Ibid., 389. Jackson.

¹⁵⁵Ibid.

commanders as to Jackson's true objective and would also serve to divert some of the Federal response away from the area of the dam.

The Union commander in the region, Gen. Banks, had some indications of Southern activity in the area but was initially unsure what the objective of this activity might be. At 10:00 p.m. on the 16th, Banks advised Col. Leonard, the commander of the Federal forces in Williamsport, that a night attack against Gen. Kelley in Romney might be in the making.¹⁵⁶ Additionally, Banks related that reports had been received which indicated a possible Confederate crossing of the Potomac near Sharpsburg. Early on the morning of the 18th, Col. Leonard reported the presence of the Confederate covering force at Falling Waters and suggested the possibility of a Southern attack against Dams No. 4 and 5.¹⁵⁷ While Banks warned Leonard that any attack against the dams might simply be a feint for a larger movement elsewhere¹⁵⁸, he also dispatched the 1st Maryland to Williamsport to assist Leonard in the defense of the area.¹⁵⁹ Later in the day, however, Banks received some confirmation that the dams were the true target of the Confederate operation. Banks wired authorities in Washington that a "Citizen of Baltimore from

¹⁵⁶Ibid., 688.

¹⁵⁷Ibid., 397. 18 December message from Banks to Gen. Williams.

¹⁵⁸Ibid. 11:00 a.m. 18 December message from Banks to Leonard.

¹⁵⁹Ibid. Banks to Col. Kenly, commander of the 1st Maryland.

Richmond reports that Richmond papers Saturday stated that orders had been given for the destruction of the canal, thinking it essential to Washington."¹⁶⁰

At daylight on the 18th, when Federal soldiers discovered the Confederate presence at Dam No. 5 and began firing on the demolition party, the Southern chief attempted to drive off the enemy through the use of artillery placed on the Virginia bluffs. To counter this shelling, however, Union forces also brought up their own artillery pieces and began a slow cannonade against the Confederate infantrymen who attempted to seek shelter behind a large grist mill located along the southern shore.¹⁶¹ With the Confederate presence at Dam No. 5 confirmed, Banks sought to further reinforce Leonard's command at Williamsport. In addition to the previously dispatched 1st Maryland, the Union commander now sent the 5th Connecticut, 29th Pennsylvania, Company F 4th US Artillery, and two companies of Maryland cavalry from their position near Frederick to the aid of the Federals near the dam.¹⁶²

The Federal presence made the work of Capt. Colston's party that much more difficult. Throughout the daylight hours on the 18th and 19th, the opposing forces continued their light artillery firing and infantry skirmishing across the river. Each night the Confederate working party rejoined its destructive efforts against the dam. In an effort to distract the Federal forces, Jackson sent a body of troops upriver

¹⁶⁰Ibid., 398. Banks to Williams.

¹⁶¹Denney, 103.

¹⁶²O.R., Vol. 5, 400. Banks.

towards Dam No. 4 on the morning of 20 December.¹⁶³ When the Union troops followed, Colston resumed work with increased vigor.

By the "...morning of the 21st a breach, supposed to be sufficiently large for the object in view, was effected"¹⁶⁴ and Jackson decided to break off the action along the canal. The Confederates had lost only one man during the expedition.¹⁶⁵ Although some light skirmishing between the Federals and Ashby's cavalymen occurred near Little Georgetown, the majority of Confederate forces were withdrawn from their advance positions and reunited for the march back to Winchester. Union scouts reported the absence of Southern troops at Dam Number 4 and the movement of those enemy units that had been near Falling Waters towards Dam No. 5.¹⁶⁶

Jackson considered the raid a success and held that there was ample "...reason to believe that the recent break in Dam No. 5 will destroy any vestiges of hope that might have been entertained of supplying Washington with Cumberland coal by the Chesapeake and Ohio Canal...."¹⁶⁷ However, the true result of the destructive expedition may have been far less than that hoped for by the Confederate general. On the 20th Banks had reported that the dam was "...but little injured...." and would

¹⁶³Denney, 103.

¹⁶⁴O.R., Vol. 5, 390. Jackson.

¹⁶⁵Ibid.

¹⁶⁶Ibid., 399. Banks to Marcy.

¹⁶⁷Ibid., 1005. 24 December letter from Jackson to Maj. Rhett, Assistant Adjutant General of the Department of Northern Virginia.

"...be repaired at once."¹⁶⁸ On the 22nd, after the Confederates had begun their withdrawal from the canal, Col. Leonard was able to report to Banks that there were "Canal-boats running to-day both ways."¹⁶⁹

With the offensive operation against the canal at a close, Confederate units moved back towards the district's strongpoint at Winchester. On the 23rd, after a two day march through bitterly cold weather, the Stonewall Brigade, Carson's militia, and other units that had participated in the expedition reached their camps in Winchester.¹⁷⁰ Jackson again requested that Loring's troops be hurried in their move towards Winchester. Reports of the still growing Federal presence at Romney suggested the need to concentrate all Confederate forces in the Valley as soon as practicable. In a letter written to Generals Johnston and Cooper, the district commander stated that "Recent intelligence from Romney gives reason to believe that the force of the enemy in Hampshire County is about 10,000 and that reinforcements are continuing to arrive."¹⁷¹ On the 24th, Gen. Loring finally reached the town.¹⁷²

Although the Confederate commander was able to spend a quiet Christmas day with his wife in Winchester, he was already preparing for his next move against the

¹⁶⁸Ibid., 398. Banks to Williams.

¹⁶⁹Ibid., 399. Banks to Marcy.

¹⁷⁰Denney, 103.

¹⁷¹Thomas J. Jackson, Letters, 16. Transcripts of letters and general orders, 1861-1863. Part of the Jedediah Hotchkiss collection. Manuscript Division, Library of Congress, Washington, D.C.

¹⁷²O.R., Vol. 5, 1005. Jackson.

Federals. The arrival of Loring's command now made an advance against Romney seem possible and Jackson did not want to delay too long before resuming active operations. On the 25th, Jackson wrote to Ashby in Martinsburg asking the cavalryman to keep him advised of any enemy movements in Morgan County or along the Baltimore and Ohio Railroad.¹⁷³ The Southern commander had to know the general strength and disposition of the Union forces before he could deduce their potential vulnerabilities and thereby refine his own operational plan. Two days later, Jackson's Assistant Adjutant General, Lt. Pendleton, again implored Ashby to provide key information to the Confederate commander:

Ascertain definitely the facts in regard to the enemy's reoccupancy of Bath; their force, etc. and report the facts to him. He can undertake no movements except upon certain information.¹⁷⁴

With typical energy, Ashby aggressively sought to fill these information gaps and reported his findings back to Jackson. The ground work had been completed for the next stage in Confederate operations.

Since his arrival in the Valley, Jackson had initiated an intelligence effort whose characteristics were to be repeatedly illustrated throughout the tenure of his command. The first among these characteristics was a willingness to draw upon various sources for his information. While some commanders or intelligence advisors might choose to rely exclusively on one particular source or type of collection asset

¹⁷³Jackson, Letters, 29.

¹⁷⁴Ibid., 35.

to fulfill certain intelligence requirements, Jackson had used several different assets to meet his informational needs. The Confederate commander had used whatever means were available, including cavalry patrols, escaped prisoners, military and civilian scouts, and his own general knowledge of the region's geography when he first tried to determine the general dispositions of the Federal forces opposing him. In much the same way, Jackson continued to use various assets to remain abreast of the changing enemy situation and to update his own plans according to information provided by these sources. In this way, reports from different sources might serve to confirm initial indications, contradict spurious assessments, and generally provide a more comprehensive and unified picture of the operational situation.

Jackson had obviously used intelligence as a primary element in the identification of specific operational objectives and the subsequent development of plans to achieve those objectives. The Confederate commander's perceptions of the enemy force at Romney had initially led him to believe that surprise against that Federal force was possible and that Romney would therefore be an appropriate objective of his offensive. As the need to modify his plans became evident after the arrival of Federal reinforcements in that town, Jackson had then used his understanding of the importance of the Chesapeake and Ohio Canal and reports of Federal troop locations near Williamsport as the basis for his decision to attack Dam No. 5.

This understanding of the relationship between intelligence and operational planning had also led Jackson to important conclusions regarding enemy use of intelligence. Believing that the Federal commanders would similarly base their own

operational plans on available intelligence, Jackson had undertaken actions that were designed to elicit a particular response from the Union forces opposing him. The obvious posting of Confederate troops near Falling Waters was intended to distract the Federals from the intended target at Dam No. 5. Similarly, Jackson believed that Federal reports of his planned move on Romney would have lured Gen. McClellan into a costly attack against Johnston's defensive position at Manassas.

Another characteristic of Jackson's intelligence effort was the way in which changes in the enemy situation were accurately reflected by changes in operational planning. The Southern general's flexible approach and modification of operational plans and objectives reflected an understanding of the basic influence that intelligence should have on operations. As it became apparent that Federal reinforcements in Romney had made an attack against that town unfavorable for the present, Jackson had simply altered his operational plan to secure a less valuable, though arguably more achievable, objective. While this operational flexibility may seem like an inherent quality of military decision making, it is common for many commanders to become so focused on an objective that they fail to modify their plans even when fundamental changes have occurred in the relative balance of combat power with the enemy. Once he had been reinforced by Loring's units and had been apprised of the general Federal dispositions by Ashby, Jackson had been able to once again turn his attention toward Romney.

C. THE ROMNEY EXPEDITION

During the final day of 1861, Jackson's troops prepared to move. Camp baggage was packed for transport and three days' rations were issued to all the Confederate soldiers around Winchester.¹⁷⁵ On 1 January 1862, Jackson began his march towards Romney. "...Garnett's brigade, with McLaughlin's, Carpenter's, and Water's batteries, Loring's command, consisting of Anderson's, Gilham's, and Taliaferro's brigades, Shumaker's and Mayre's batteries, and Meem's command, moved from their various camps near Winchester in the direction of Bath,"¹⁷⁶ site of a Federal outpost and, therefore, an intermediate objective on the way towards Romney. As the Confederate soldiers set out from their former bivouac sites, it was "...a beautiful day, the sun shining brightly and the atmosphere bracing."¹⁷⁷ After several hours on the road, however, the weather began to deteriorate rapidly with snow, ice, and bitterly cold wind harassing the soldiers. By evening the army had reached Pughtown, where it camped for the night (MAP 3).¹⁷⁸

"We marched the next morning at early dawn....," remembered one infantryman.¹⁷⁹ Again, however, the cold weather and resulting poor marching conditions slowed the

¹⁷⁵Thomas J. Jackson, Orders, 68. Transcripts of letters and general orders, 1861-1863. Part of Jedediah Hotchkiss collection. Manuscript Division, Library of Congress, Washington, D.C.

¹⁷⁶O.R., Vol. 5, 390. Jackson.

¹⁷⁷Worsham, 43.

¹⁷⁸Ibid.

¹⁷⁹Ibid.

progress of the Confederate column. Only about 8 miles were covered that day and the army established its bivouac near Unger's Store. The men of Loring's command suffered under particularly harsh conditions that night because of poor campsite selection and the fact that the food and baggage wagons failed to reach their location until the following day.¹⁸⁰ That evening part of Carson's militia brigade and two cavalry companies joined Jackson's force at the camp site.¹⁸¹ This brought the Confederate aggregate force total to around 8500 men.

Heading north from Unger's Store, the Confederate force continued its march on the 3rd. While the Southern main body, led by Loring's command, moved up the Frederick and Morgan turnpike, the two militia brigades "...inclined to the left and crossed Warm Springs Mountain for the purpose of attacking Bath from the west...."¹⁸² Several miles from the town, the Confederates ran into a small Federal outpost which was easily scattered by Loring's advance skirmishers. Similarly, another Union party was driven from its position west of Warm Springs Mountain by the Southern militia. Jackson had been travelling immediately behind the Confederate scouts of the main column, ahead of the advance guard, and was therefore instantly aware of the Federal presence.¹⁸³ Following the brief contact with the Federal outpost, Jackson had expected Loring "...to attack and press forward with

¹⁸⁰O.R., Vol. 5, 1071. 12 February 1862 letter from Loring to Secretary Benjamin, responding to court-martial charges from Jackson.

¹⁸¹Ibid., 390. Jackson.

¹⁸²Ibid., 389. Jackson.

¹⁸³Ibid., 1070. Loring's court-martial response to Benjamin.

requisite promptness", but, owing to Loring's own position in the marching column, it was some time before the brigadier was even aware of the enemy presence and any additional Confederate troops dispatched forward.

Although the Union outposts had been swept aside with relative ease, they had still spoiled Jackson's desire to take Bath by surprise. With nightfall approaching, the Confederate commander decided to encamp for the night and assault the town the following morning.¹⁸⁴ The Southern soldiers could hardly enjoy the delay, however, since "It snowed during the night and the weather became cold."¹⁸⁵

Reports of the Confederate advance had been reaching the Union forces in Bath for several days and outposts had been quickly established to provide tactical warning of Jackson's arrival.¹⁸⁶ One company of the 39th Illinois was divided into squad-sized scouting parties and disposed in an extended perimeter of observation several miles from the town. As one of these reconnaissance parties observed the approach of Confederate scouts, the Southerners fired three warning shots and brought up infantry skirmishers to drive the Northern pickets away. In the wake of the brief clash, the Federal scouts of this party were so scattered that they were unable to reunite and return until the following day.¹⁸⁷

¹⁸⁴Ibid., 389. Jackson.

¹⁸⁵Worsham, 44.

¹⁸⁶O.R., Vol. 5, 401. Capt. Linton, commanding Company D, 39th Illinois.

¹⁸⁷Ibid., 401. Linton.

On the morning of the 4th, Loring's command again assumed the lead in the Confederate advance. About 2 miles from the town, however, Loring perceived that his troops were in danger of "...being enfiladed by the enemy's cannon on a hill in front and flanked by a party of his infantry stationed on a wooded hill on our left."¹⁸⁸ The Confederate brigadier halted his troops several times as he tried to figure out the next appropriate move. Incensed at these seemingly unnecessary halts, Jackson now moved forward to determine the reason for the delay and, after a quick consultation with Loring, personally ordered several regiments forward to deal with the Federals. The 1st Tennessee would advance on the left with the 7th Tennessee in support while the 48th Virginia moved on the right.¹⁸⁹

Around noon the Confederates began their attack against the Federal positions guarding the town.¹⁹⁰ "We came in sight of the enemy, who were in line of battle on that ridge, about one and a half miles from Bath," recalled one Southern private.¹⁹¹ After several volleys of fire, the obvious strength of the Confederate force became all too apparent to the Federal troops on the ridge and the Union units began a rapid retreat. Although the Northern position had completely collapsed, Loring

¹⁸⁸Ibid., 1070. Loring to Benjamin.

¹⁸⁹Ibid., 390. Jackson.

¹⁹⁰Ibid., 402. Capt. J.H. Hooker, 39th Illinois.

¹⁹¹Worsham, 44.

failed to aggressively rush his own men forward and thereby lost contact with the retreating enemy.¹⁹²

Jackson, however, was not content to let the Federals flee unmolested. Anxious to begin the pursuit of the obviously beaten enemy, "Jackson now arrived at the front and took the lead on horseback...."¹⁹³ With Lt. Col. Baylor of the staff and a small body of Southern cavalry, the Confederate commander entered the town ahead of his leading infantry units and attempted to discern the route of the Federal retreat from the town. Jackson believed that the Union troops would try to reach Hancock, Maryland via the route through Sir John's Run depot and directed his infantry to pursue in that direction.¹⁹⁴ Pvt. Worsham of the 23rd Virginia stated that, as the Southern troops quickly passed through the town in pursuit of the Federals, he "...could see the Yankees disappearing at the far end of a field going toward the Potomac river. We followed, but the road ran through a defile and we could not go as fast as the enemy, because we had to look out for their rear guard, who occasionally came in sight and fired."¹⁹⁵

News of the fight at Bath quickly spread to other Northern units throughout the area. From its position near Sir John's Run, the 84th Pennsylvania had moved to support the Union troops in Bath but, when faced with the sight of other retreating

¹⁹²O.R., Vol. 5, 391. Jackson.

¹⁹³Worsham, 45.

¹⁹⁴O.R., Vol. 5, 391. Jackson's after-action report.

¹⁹⁵Worsham, 45.

Federals and the lack of combat experience within its own ranks, this unit also joined the retreat back towards its former post.¹⁹⁶ The 39th Indiana, which had been dispatched to the depot at Sir John's Run aboard railroad cars, simply turned around when its members saw the other retreating troops and headed back towards the railway bridge at Great Cacapon.¹⁹⁷

By 8:00 p.m., when the main Confederate body reached Sir John's Run,¹⁹⁸ all of the Federals had crossed the Potomac.¹⁹⁹ After using some Confederate cavalry units to clear the nearby woods of any Union skirmishers, Jackson attempted to continue his pursuit across the river towards Hancock, Maryland, the supposed destination of the retreating enemy force. Although his own units were somewhat fatigued and disorganized by the brief clash and pursuit, the Confederate commander believed that it would be advantageous to strike the Union units before they could organize a credible defense. An attempted ambush by Federal units along the route to Hancock and the growing darkness, however, led Jackson to call off actions for the night.²⁰⁰

Although Federal troops remained posted on a hill on the Maryland side of the railway bridge at Great Cacapon,²⁰¹ Jackson issued orders that night for Col. Rust

¹⁹⁶O.R., Vol. 5, 402. Hooker.

¹⁹⁷Ibid.

¹⁹⁸Ibid., 403. Hooker.

¹⁹⁹Ibid., 391. Jackson.

²⁰⁰Ibid.

²⁰¹Ibid., 403. Hooker.

of the 3rd Arkansas to begin the destruction of that span.²⁰² This would help to eliminate any future communications or troop movements between Hancock and Romney. Cavalry pickets were posted along the banks of the Potomac to guard against any possible counterattack. Since the terms of enlistment for many of the militia troops were about to expire, Jackson also issued orders extending the militia's service until the present campaign was over with.²⁰³ The Confederate commander needed to retain all available manpower to continue his offensive towards Romney.

On the morning of the 5th, Jackson sent a written message to the Federal commander at Hancock in which he formally demanded the surrender of that town. Then, in retaliation for what he considered to be the unprovoked shelling of Shepardstown, Virginia by Union forces, Jackson sent several artillery shells flying into the small Maryland town. Although Federal artillery responded by lobbing a few shells back at the Confederate forces near the river,²⁰⁴ neither side did any real damage to the other. As it became obvious that the Union commander would not promptly surrender, Jackson readied his forces to attack the town. Southern troops began preparing a bridge across the Potomac 2 miles above the town. The weather continued to plague Confederate operations and, that night, more snow, hail, and cold winds harassed the troops of the Confederate bridging party.²⁰⁵

²⁰²Ibid., 391. Jackson.

²⁰³Jackson, Order, 3.

²⁰⁴Worsham, 45.

²⁰⁵Ibid.

By 6 January, Jackson received reports that the Federals in Hancock had been substantially reinforced.²⁰⁶ The Southern general had recognized the necessity of clearing the Federals from Bath, who otherwise would have threatened the Confederate flank during any advance towards Romney. Similarly, Jackson had been willing to continue the attack against the Federal force at Hancock as long as it remained a small and isolated detachment. The presence of Union reinforcements changed Jackson's assessment. The defeat of the Federal force at Romney remained the primary object of the expedition and the Confederates could not afford to waste more time or manpower against Hancock. Since the Federals at Bath had been "...driven across the Potomac, the telegraph line broken at several points, and the railroad bridge across Great Cacapon destroyed, thus throwing material obstacles in the way not only of transmitting intelligence from Romney to Hancock, but also of receiving re-enforcements from the east, arrangements were made for moving on Romney."²⁰⁷

Gen. Kelley, the Federal commander at Romney, was far from idle during the Confederate advance. Various sources had warned of Jackson's movements and Kelley decided to take action. On the 6th, he ordered Col. Dunning of the 5th Ohio to assemble a body of 2,000 men for an operation against the Confederate force reported to be in the vicinity of Hanging Rock.²⁰⁸ Kelley thought that an attack

²⁰⁶O.R., Vol. 5, 392. Jackson.

²⁰⁷Ibid.

²⁰⁸Ibid., 404. Dunning.

against this Confederate body might prompt Jackson to abandon his operations against Hancock and to withdraw back to Winchester.²⁰⁹ At 12:30 a.m. on the 7th, Dunning's column set out from Romney towards the Southern outpost.²¹⁰ By 7:00 a.m., the Union force had reached a hill 1 mile from the gap. On top of this hill, which offered a clear field of view of the enemy position, Dunning placed his artillery and disposed his available infantry for an immediate assault against the Confederates. With the 5th Ohio advancing on the left and the 4th Ohio on the right, the Federals charged against Col. Monroe's Southern militia²¹¹ and easily drove the Confederates from the gap. In addition to wresting control of the gap from the estimated 800-1000 enemy soldiers, the Union troops also captured two pieces of artillery.²¹²

Despite the onset of an ice storm, the Confederates began a southward march from the Potomac on the 7th.²¹³ While Ashby's cavalry stayed in the rear as protection against any attempted Federal counterstroke, the infantry struggled through the terrible weather.

The march was a terrible one; the road had become one sheet of ice from constant marching over it, and the men would march in the side ditches and in the woods...In some instances the horses had to be taken from the cannon

²⁰⁹Ibid., 404. Kelley.

²¹⁰Ibid., 404. Dunning.

²¹¹Ibid., 396. 11 January letter from Jackson to Johnston.

²¹²Ibid., 405. Dunning.

²¹³Denney, 109.

and wagons, and men with chains and ropes pulled them, the horses being sent forward through the woods; and at many hills the pioneers had to cut trenches across the road, in order that the men might have footing...I saw Gen. Jackson marching along the road with the men several times.²¹⁴

After arriving at Unger's Store that evening, Jackson decided to allow his troops to rest for several days before resuming the march.²¹⁵

On the 10th, the Confederates recommenced their trek towards Romney. Again, the weather seemed to be working against the Confederates as a hail storm pelted the exposed Southern troops.²¹⁶ That day some Confederate units marched only 4 miles over the frozen and icy ground. As Jackson's infantry was struggling over the slippery ground, the Union forces under Gen. Kelley were evacuating Romney.²¹⁷ Ever watchful of Kelley's actions, the Confederate cavalry companies of Captains Sheetz and Shand occupied the town soon after the Federal departure.

Although Romney had been abandoned by the Federals and was now in Southern hands, the main Confederate body was still miles from its objective. On the 11th, many units made only 4 miles during the entire day's march and one regiment logged a mere 500 yards as its progress.²¹⁸ A soldier in the 21st Virginia stated that "Owing

²¹⁴Worsham, 45-46.

²¹⁵O.R., Vol. 5, 392. Jackson.

²¹⁶Worsham, 46.

²¹⁷O.R., Vol. 5, 392. Jackson.

²¹⁸Worsham, 46.

to the terrible weather, our line was scattered over ten miles of road.²¹⁹ Snow and hail again plagued the Southern troops on the 14th.²²⁰ On 15 January, after two weeks on the march, the leading brigade of Loring's command, under Taliaferro, finally reached Romney.²²¹ Many of the Confederate units would still be on the road for another two days before reaching the town.²²² Only after their arrival in Romney did the weather start to show some favor on the weary Southern soldiers for "Here the sun came out and shone on us, the first time for nineteen days."²²³

Upon his arrival in Romney, however, Jackson remained far from content with simply occupying the town. Instead, the Confederate chief now sought to continue his offensive against the 11,000 Federal troops located near the town of Cumberland, Maryland, about 27 miles from Romney. The Confederate commander wrote to Gen. Johnston that "At last accounts the enemy were crossing the Potomac into Maryland on the railroad bridge below Cumberland."²²⁴ On the 16th Jackson hoped to begin his movement towards Cumberland with Taliaferro's brigade but "...such was the extent of demoralization in the...brigade as to render the abandonment of that

²¹⁹Ibid.

²²⁰Ibid.

²²¹O.R., Vol. 5, 393. Jackson.

²²²Worsham, 47.

²²³Ibid.

²²⁴Jackson, Letters, 8. 16 January 1862.

enterprise necessary."²²⁵ Although the Confederate commander referred simply to the "demoralization" of Taliaferro's command, sickness and the effects of exposure during the march to Romney were probably equally responsible for the lack of effective manpower in the brigade. When Jackson was forced to cancel the offensive a second time on the 17th, one regiment had reported only 15 men capable of walking.²²⁶

Jackson, believing that it would be inopportune to keep the entire army at Romney "...less Gen. Banks should cross the Potomac..."²²⁷ and attack the Confederate flank or rear, issued orders on the 18th to place his army into winter quarters.²²⁸ Loring's three brigades, along with 13 artillery pieces, were to remain in Romney. Additionally, Jackson detached three cavalry companies to provide Loring with the necessary number of scouts for reconnaissance and screening duties in the area. Among these mounted units was the company commanded by Capt. Sheetz, whom Jackson believed provided the "...most reliable information regarding the enemy..."²²⁹ The remaining cavalry assets under Lt. Col. Ashby were to be distributed along the Potomac to provide similar warning and screening ability for the rest of the district. The militia brigades were to be stationed near their home

²²⁵O.R., Vol. 5, 393. Jackson.

²²⁶Denney, 114.

²²⁷Jackson, Letters, 10. @0 January letter from Jackson to Secretary Benjamin.

²²⁸O.R., Vol. 5, 393. Jackson.

²²⁹Ibid.

mustering sectors. Gen. Carson's men were stationed around Bath while Meem's command moved to Martinsburg. Finally, Garnett's Stonewall Brigade was to be moved back to Winchester where it could act as a mobile reserve to reinforce any part of the district that might be threatened by a Federal advance.

Although Jackson was aware of the continued presence of strong Federal formations in the area, he believed that the disposition of his own forces would allow for ample warning and concentration to meet these various threats. The Confederate commander was well aware of the 11,000 Union troops at Cumberland and also knew that the enemy was "...still in force on this side of the Potomac, 7 miles below Cumberland and 20 miles from here."²³⁰ Intelligence reports indicated that the Federals had also positioned 2,000 men at Hancock, 8,000 at Frederick and a force of unknown size in Williamsport.²³¹ The Confederate cavalry had already proven itself quite capable in detecting enemy locations and movements. Ashby's position would allow for sufficient notice of any Federal units crossing the Potomac and the three companies with Loring should have been more than sufficient to provide constant picketing and screening to the west and north of that position. Jackson further believed the position at Romney to be relatively safe because of the overall size of Loring's force, the presence of a defensible mountain to the rear, the proximity of Confederate Brig. Gen. Edward Johnson's force, and the presence of three improved

²³⁰Jackson, Letters, 18. Jackson to Johnston.

²³¹*Ibid.*, 8. 16 January 1862.

roads as possible lines of retreat.²³² The Stonewall Brigade's location at Winchester placed it in a position to defend against any Federal attack from Williamsport or Harper's Ferry, threaten the Baltimore and Ohio Railroad, reinforce Loring or any of the militia brigades, withdraw up the Valley turnpike, or prepare for an eastward movement to reinforce Gen. Johnston.

With the order placing his troops into winter quarters, the offensive portion of Jackson's Romney expedition effectively came to a close. The Confederates had evicted the Federals from the northwestern corner of the Valley District and had positioned themselves to defend against any subsequent Federal attack or to launch further offensive actions.

While Confederate intelligence had been generally competent during the expedition to Romney, certain features of Jackson's approach to the intelligence effort were especially notable. Cavalry reports from Ashby and other trusted subordinates had formed the framework on which the Southern general had based his offensive plan for the expedition. These mounted forces had to locate, track, and report the movements of Federal units near Bath, the Baltimore and Ohio Railroad, and throughout Morgan County before Jackson could undertake any offensive action. Advanced pickets and scouts provided tactical updates to the location of enemy positions during the movement phases of the operation and allowed for the proper deployment of combat units to capitalize on Federal vulnerabilities. At Hancock,

²³²O.R., Vol. 5, 393. Jackson.

Jackson had shown flexibility in canceling his proposed attack against the town once intelligence reached him of the arrival of Federal reinforcements there.

One significant factor that effected Jackson's use of intelligence during the operation was his forward position throughout much of the action. During the attack on Bath on the 4th, Jackson's presence near the front of the Confederate column had allowed for the initial deployment of the Southern infantry to meet the perceived threat on Loring's left, the rapid pursuit of the Federals towards Sir John's Run, and the attempted push towards Hancock. Because of his forward position in the attacking Confederate formation, Jackson was able to rapidly assess current tactical information in the context of broader operational level intelligence and make decisions that would have a positive influence on the course of the engagement. While it might have been safer for the Confederate commander to remain further from the front, this type of detachment from the action would have resulted in delays in the transmission of significant but perishable combat information and associated delays in the decision making process. Instead, Jackson's presence with his main effort, Loring's command, allowed him to properly exploit the Federal retreat and immediately order his entire army into a pursuit of the fleeing Northern soldiers.

D. PROBLEMS OF COMMAND

Despite Jackson's own belief in the success of the recent expeditions and the strength of the army's present dispositions, discontent within his command was building. Most of this contention was centered among the officers of Loring's command, who believed that their units' assignment to Romney for the winter was

unfairly harsh for the soldiers as well as operationally unsound. On 23 January, Col. Samuel Fulkerson, commander of the 37th Virginia, wrote to Walter Staples, an old friend and Confederate politician in Richmond.²³³ In this letter Fulkerson voiced great concern over the "...terrible exposure since leaving Winchester, which has emaciated the force to almost a skeleton, compared to what it was on marching from that place."²³⁴ From his post at Romney, Fulkerson also voiced the opinion that "This place is of no importance in a strategical point of view; the country around it has been exhausted by the enemy, and its proximity to the enemy and the Baltimore and Ohio Railroad will wear us away (already greatly reduced) by heavy picket and guard duty."²³⁵ After airing these grievances Fulkerson then asked Staples to take the matter before the "...Adjutant-General, the Secretary of War, and the President, if necessary...." in the hopes of getting some favorable reaction.²³⁶ In an enclosure attached by Taliaferro, Fulkerson's brigade commander, Staples was informed that it would be "...suicidal in the Government to keep this command here."²³⁷ Like Fulkerson, Taliaferro also asked Staples to use his influence to "...urge the withdrawal of the troops...." from Romney back to Winchester.²³⁸

²³³Ibid., 1040-1041. Fulkerson.

²³⁴Ibid.

²³⁵Ibid.

²³⁶Ibid.

²³⁷Ibid., 1042. Taliaferro.

²³⁸Ibid.

On 25 January, 11 of Loring's subordinate commanders signed a petition calling for the removal of the command from Romney, a position they characterized as "...a place difficult to hold, and of no strategical importance after it is held."²³⁹ The signators also stated that the command would be better positioned to meet an enemy threat at "...almost any other place." Upon his receipt of the petition on the 26th, Loring wrote a brief endorsement in which he stated agreement with his subordinates, asked that the letter be sent to the Secretary of War, and forwarded the document to Jackson.²⁴⁰ The district commander's own covering letter was short and accurately reflected his own assessment of the operational situation and of Loring's command -- "Respectfully forwarded, but disapproved."²⁴¹ The document was then sent to the War Department.

The petition's effect on Secretary of War Benjamin was almost immediate. Coupled with reports from Gen. Joseph Johnston that large bodies of Federal troops had been noted moving towards Harper's Ferry, the message from Loring filled the Secretary with apprehension. On the 26th he wrote to Gen. Joseph Johnston and asked the senior field commander to "...examine for yourself into the true state of the case, take such measures as you think prudent under the circumstances, and report to the Department whether any measures are necessary on its part to restore the

²³⁹Ibid., 1046-1047. 25 January petition to Brig. Gen. Loring signed by Col. W.B. Taliaferro, Col. S.F. Fulkerson, Maj. V.H. Manning, Maj. J.W. Anderson, Capt. A.V. Scott, Col. J.S. Burks, Lt. Col. D.A. Langhorne, Maj. P.B. Adams, Capt. J.Y. Jones, Capt. R.H. Cunningham, and Col. J.A. Campbell.

²⁴⁰Ibid., 1048. Loring.

²⁴¹Ibid., 1048. 4 February endorsement by Jackson.

efficiency of that army, said to be seriously impaired.²⁴² On the 29th, Johnston dispatched his acting departmental Inspector General to the Valley to investigate the true state of affairs in the Valley District.²⁴³

The War Department, however, would not allow Johnston enough time to exercise his normal authority or discretion in this matter. On 30 January, Benjamin sent the following peremptory order to Jackson:

Our news indicates that a movement is being made to cut off General Loring's command. Order him back to Winchester immediately.²⁴⁴

President Davis, after reading the letters of complaint and glancing at the Confederate positions on a rough map of the area, had personally instructed Benjamin to issue the order. Because the order had been transmitted directly to Jackson, neither Gen. Johnston nor any other senior military leaders were informed of the directive.

The directive character of the order as well as the identity of the originator indicated that Jackson would be allowed no discretion in its execution. After receiving the telegram, Jackson immediately began readying the units near Romney for a prompt withdrawal. Loring's units were told to prepare for a march back to Winchester and, on the 31st, orders were also issued to the militia commander in Bath to prepare for a withdrawal to Unger's Store. With typical regard for operational

²⁴²Ibid., 1049. Benjamin.

²⁴³Ibid., 1051. 29 January letter from Johnston to Benjamin.

²⁴⁴Ibid., 1053.

security, Jackson also enjoined his subordinates not to share the information regarding the destination of the movements with any of the troops.²⁴⁵

Despite his prompt compliance with both the spirit and letter of Benjamin's order, Jackson was furious over this interference in the operational military affairs of his district. Although national decision makers might typically try to guide the strategic direction of military campaigns or divert forces from one operational command to another for strategic reasons, the War Department's peremptory order had bypassed all normal military channels and effected the status of operational level, not strategic, unit dispositions. Apparently, Gen. Johnston had not even been consulted prior to the issuance of the order. Frustrated by almost every aspect of the order, Jackson wrote to Secretary Benjamin on the 31st:

With such interference in my command I cannot expect to be of much service in the field, and accordingly respectfully request to be ordered to report for duty to the superintendent of the Virginia Military Institute at Lexington, as has been done in the case of other professors. Should this application not be granted, I respectfully request that the President will accept my resignation from the Army.²⁴⁶

In accordance with accepted military procedures, Jackson routed the letter of resignation, along with a copy of Benjamin's order, through Gen. Johnston. He also sent a copy of the letter of resignation to Virginia Governor John Letcher.²⁴⁷ When Johnston received the package, he too was incensed by Benjamin's interference in the

²⁴⁵Jackson, Letters, 36.

²⁴⁶O.R., Vol. 5, 1053. 31 January letter from Jackson to Benjamin.

²⁴⁷ibid., 1060. 3 February letter from Letcher to Benjamin.

positioning of operational field forces. Jackson's letters were the first notice that the senior general had of the order and this angered Johnston even further. A subsequent letter from Jackson on 1 February seemed to illustrate the logic of the original dispositions and the lack of an immediate Federal threat to the Valley.²⁴⁸ In an uncharacteristically personal response to Jackson, Johnston attempted to mollify his subordinate. While Johnston admitted that he could not override Benjamin's directive, he suggested that he too might resign if such interference continued.

On 3 February, Loring's Confederates were withdrawn from Romney. The troops left the town "...late in the night, and it snowed again."²⁴⁹ Throughout the 4th and 5th, the Southern infantry continued their march toward Winchester without incident, although the weather remained cold. On the 6th, Maj. John Harman, Jackson's quartermaster, observed that "Loring's command has been dropping in all day, a terribly disorganized band..."²⁵⁰ Whether due to poor discipline and leadership or the harsh conditions in Romney, Loring's command was truly in bad shape. Many soldiers were sick, most were in want of new equipment, and morale was low. One soldier remembered the expedition as "...the most terrible experience during the war."²⁵¹

²⁴⁸Ibid., 1056. Jackson.

²⁴⁹Worsham, 48.

²⁵⁰John A. Harman, Manuscript. Collection of letters, 1861-1862. Manuscript Division, Library of Congress, Washington, D.C.

²⁵¹Worsham, 48.

After receiving Jackson's 31 January resignation, Governor Letcher took immediate action to forestall the general's departure from active military service. The governor recognized Jackson's military talents and the justified nature of his complaint. To Secretary Benjamin, Letcher personally protested the direct interference in the Valley District's operational command. He also wrote a letter to Jackson asking the Confederate commander to reconsider his decision, for the good of the army. The content and wording of the governor's message obviously struck a patriotic chord with the general. On 6 February, Jackson responded to Letcher's letter. While Jackson allowed that his basic views regarding Benjamin's interference remained unchanged, he also authorized Letcher to withdraw the letter of resignation.²⁵² Letcher communicated the withdrawal to President Davis on the 10th, effectively bringing the incident to a conclusion.²⁵³

Benjamin had realized, however, that relations between Jackson and Loring would never be conducive to good military order. On 9 February, in an effort to ease some of the internal tensions within the Valley District, Secretary Benjamin issued orders transferring much of Loring's command to areas outside of the Valley.²⁵⁴ Additionally, Loring himself was transferred to Georgia for duty with Gen. Lee.²⁵⁵

²⁵²O.R., Vol. 5, 1063. 6 February letter from Jackson to Letcher.

²⁵³Ibid. 10 February note from Letcher to Davis.

²⁵⁴Ibid., 1067. Benjamin to Johnston.

²⁵⁵Ibid.

Loring's departure from Romney had again left that region open to possible occupation by the Federals. On 6 February, Jackson advised Col. Sencindiver, the commander of the militia units guarding Bloomery Gap to "...keep well informed of what is passing in the neighborhood" and to rely on hard facts rather than local rumors in determining the enemy situation.²⁵⁶ Sencindiver's position now served as an important Confederate outpost guarding the western approaches to Winchester. With the withdrawal of Loring's command, the Federals easily reoccupied Romney on the 7th²⁵⁷ and Moorefield on the 12th.²⁵⁸

Other Union troops were making preparations for an advance across the Potomac. On the 13th, two Federal columns of 2,000 men each marched over 30 miles to an assembly area on the north side of the Potomac.²⁵⁹ That night, working parties from this force built a bridge across the river at Great Cacapon. The following morning Lander's troops advanced on Bloomery Gap in a "forced reconnaissance" that drove Sencindiver's small Confederate militia force from the area. While Lander was pushing towards Bloomery Gap, a smaller Union force under Col. Carroll temporarily occupied Unger's Store²⁶⁰, only 21 miles from Winchester.²⁶¹ Although Ashby was

²⁵⁶Jackson, Letters, 60.

²⁵⁷O.R., Vol. 5, 388.

²⁵⁸Ibid., 395. Jackson.

²⁵⁹ibid., 405. Lander.

²⁶⁰Ibid.

²⁶¹Ibid., 395. Jackson.

able to recover control of Bloomery Gap after a skirmish two days later, Jackson was still being forced to react to Federal initiatives.²⁶² To increase the warning of any Federal advance, Jackson now ordered Ashby to post one cavalry company at Bloomery Gap and a second company between that position and Winchester.²⁶³

From an intelligence perspective, the Confederate War Department's interference in Jackson's operational deployments was a basic violation of the natural link between intelligence and operational planning. Secretary Benjamin and President Davis had, from their detached perspective in Richmond, rejected Jackson's use of intelligence as the basis for force dispositions and opted instead for deployments which failed to reflect an accurate understanding of the operational situation. While Jackson's dispositions had been based upon a detailed intelligence assessment of the probable enemy courses of action, the characteristics of the area of operations, and his own army's capabilities, the peremptory orders calling for Loring's withdrawal from Romney had been based on near-mutinous complaints from subordinate officers, unsubstantiated rumors of possible Federal movements near Harper's Ferry, and a cursory examination of Confederate locations in the lower Valley without the benefit of understanding their operational significance. In essence, national decision makers had rejected the intelligence assessment of an operational commander although they had no hard additional information which would suggest that the original assessment was wrong.

²⁶²Ibid., 395. Jackson. Also in Jackson, Letters, 85. Sent on 14 February 1862.

²⁶³Jackson, Letters, 101. 17 February.

E. THE BEGINNINGS OF JACKSON'S INTELLIGENCE

Throughout the Confederate operations during the winter of 1861-1862, Jackson had revealed several fundamental characteristics in his execution of the intelligence effort. Perhaps the most important aspect of Confederate intelligence in the Valley District was the active role taken by Confederate commander. While many military commanders might have left the planning and direction of the entire intelligence effort to a specific staff officer or subordinate, Jackson himself played the central role in almost every phase of the intelligence process. Jackson had initially sought information regarding the size, location, and activities of Federal forces within his area of operations and had repeatedly reemphasized these points as basic requirements for his intelligence collection assets. As the Confederate general had narrowed his area of operational interest, he also became more specific in the statement of his intelligence requirements. While broad area searches may have sufficed in the initial stages of operational planning, a narrower focus towards enemy positions in Bath and Morgan County were needed to support planning for the attack on Romney. Jackson's own understanding of the area of operations and possible operational objectives complemented this personal involvement and allowed the general to assess the overall importance of reported enemy actions with regard to his own plans.

Associated with Jackson's personal involvement in the intelligence endeavor was the centralization of that effort at the operational level. While Confederate intelligence assets might have been diffused to provide subordinate commanders with

a collection capability or to cover a wider area of the vast Valley District, Jackson chose instead to retain all intelligence assets under his own direct command and meet the operational, rather than tactical, requirements for intelligence. Because almost all of the operational planning was done by Jackson and select members of his immediate staff, intelligence that was centrally controlled at the operational level could remain focused towards operationally significant requirements. Additionally, this centralization meant that all information gained by collection assets could be centrally analyzed for consolidation into a single, comprehensive intelligence assessment. The resulting "fusion" of seemingly unrelated bits and pieces of information would provide Jackson with an understanding of the enemy situation that was based on a variety of sources and yet focused towards the commander's operational goals. Although Jackson often disseminated key intelligence assessments to meet the needs of subordinate commanders, these subordinates were forced to rely on organic elements of their own units, rather than some temporary augmentation, to meet any separate needs for tactical intelligence that they might have.

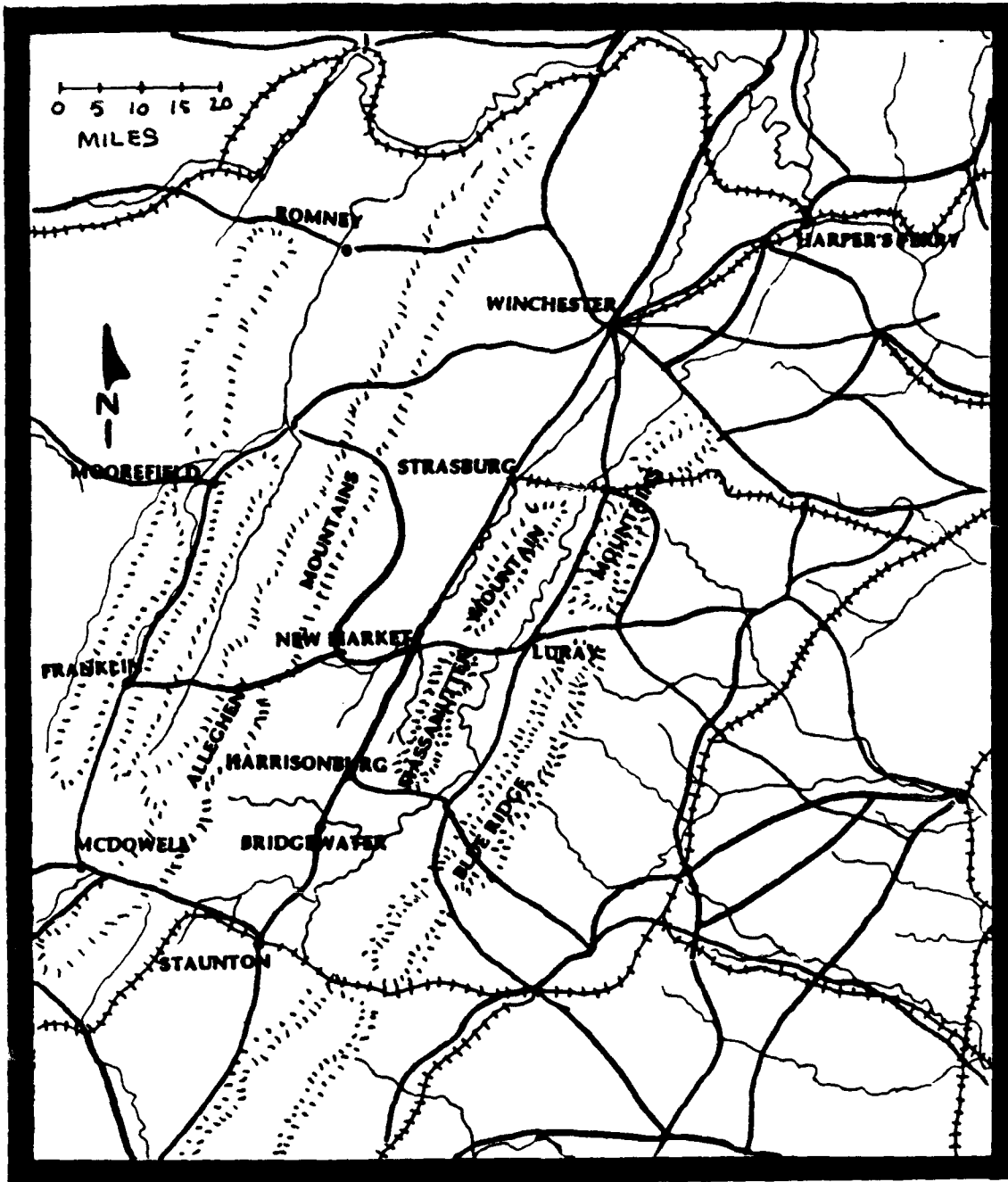
Another important aspect of Confederate intelligence during this phase of the campaign was the inseparability of intelligence and operational planning. While the primary reason for this was Jackson's own central role in both the intelligence and planning functions, the balanced approach that Jackson exercised indicated an understanding of the unified nature of these two areas. Jackson obviously had some broad operational goals in mind when he first arrived in the Valley--namely the defense of the Valley against invasion, the expulsion of any Federal units presently

in the Valley, and the projection of Confederate military power into Federal territory. By tasking his various intelligence assets to locate and track the Federal forces in the area, and by balancing these reports with his previous knowledge of the area of operations, Jackson hoped to identify specific operational objectives and targets, the seizure of which would help him to obtain his goals. After these objectives had been identified, Jackson would attempt to refine his operational plans by determining the enemy's potential strengths and vulnerabilities that would effect his own ability to achieve that objective. Given Jackson's goal of expelling the federals from the district, the Confederate commander then planned for an attack against Romney once Federal troops were identified at that location by Ashby in November. As Jackson increased his intelligence focus on Romney during December, he became aware of the unexpected strength of the Federal force there and was forced to change his planned operational objective to a less heavily defended site such as Dam No. 5. The constant interaction between intelligence and operational planning had allowed Jackson to properly weigh his own combat strength with that of the Federals and opt for the most advantageous course of action.

Finally, the general flexibility which Jackson exercised in his decision making process allowed the Confederate commander to efficiently use his intelligence as an integral part of operational planning. Although Jackson had identified Romney as the primary objective of his offensive plans in November, reports of Federal reinforcements and the absence of Loring's command altered Jackson's assessment of the enemy's relative combat power. Rather than ignoring the importance of this

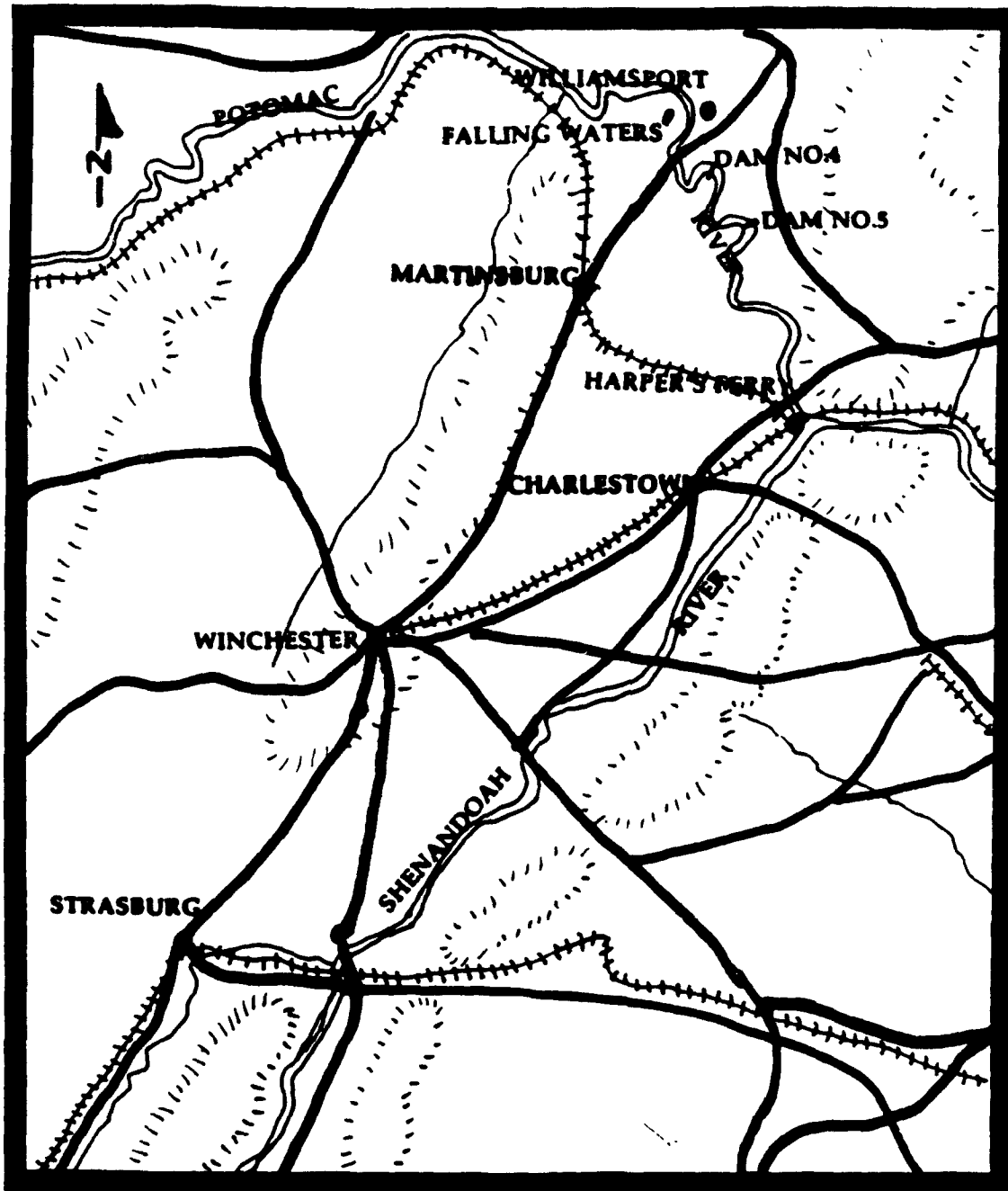
intelligence and continuing to pursue the capture of an already identified objective, Jackson simply modified his operational plans and refocused his intelligence effort towards Dam No. 5. The failure to change his operational plans would have meant that Jackson had similarly failed to include intelligence in the planning process. In some ways, Benjamin's peremptory order of 30 January fell into this trap of operational inflexibility and the exclusion of intelligence from key decisions. Davis and Benjamin had based their decision to recall Loring's force to Winchester largely upon subordinate officers' personal objectives and a cursory look at Confederate force dispositions rather than on a balanced intelligence assessment weighing the effects of enemy dispositions and regional characteristics on Confederate capabilities.

MAP 1



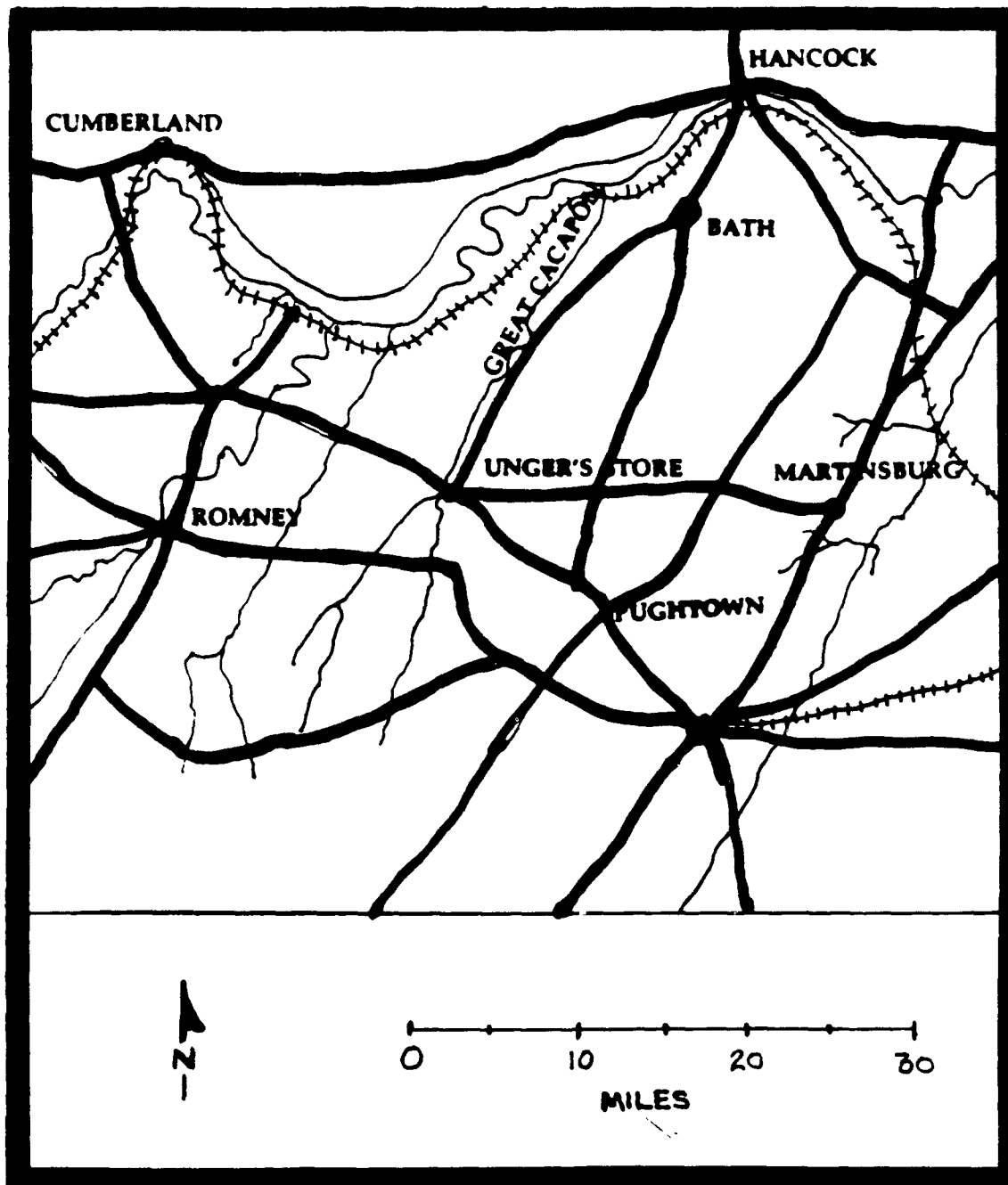
THE SHENANDOAH VALLEY

MAP 2



AREA OF OPERATIONS: DECEMBER 1861

MAP 3



AREA OF THE ROMNEY EXPEDITION

III. FEDERAL TAKE THE OFFENSIVE

A. THE ADVANCE ON WINCHESTER

Throughout the month of February, the Federals had been preparing an overwhelming counterforce to oppose Jackson's little army. By the end of the month, Maj. Gen. Nathaniel Banks had assembled over 38,000²⁶⁴ troops on the Maryland side of the Potomac across from Harper's Ferry. Banks' forces had the general mission to ensure the security of the Baltimore and Ohio Railroad, a major supply and transportation route linking Washington with the west, as an integral part of McClellan's planned strategic offensive against the southerners. Because Winchester and Strasburg were seen as the keys to securing the railway, the Federal possession of these towns would be the major objective of Banks' army.²⁶⁵

In initial reports to Washington, Banks appeared anxious to begin active operations against the Confederates. On 23 February he reported to Washington that "The roads to Winchester are turnpikes and in tolerable condition. The enemy is weak, demoralized and depressed."²⁶⁶ Despite the general tone of this dispatch, however, the Confederates would prove themselves to be far less demoralized than Banks

²⁶⁴ Clark, 61.

²⁶⁵O.R., Vol. 5, 48. Official summary report of Maj. Gen. McClellan on operations in Virginia during 1862.

²⁶⁶Clark, 63.

suspected and the Federal advance would prove much slower than Washington officials hoped.

Confederate leaders were well aware of the army being assembled opposite Jackson. Easy access to northern newspapers, which consistently reported troops movements, force structures, and planned offensives, provided the Confederates with basic information about the enemy. Additionally, because of widespread Confederate sympathy in many parts of Maryland and Washington, the Federals had great difficulty in concealing any major troop movements or concentrations in that region. This fact was all too evident to many Federal troops. One Massachusetts soldier complained that, "So many friends of the Rebels and their cause were still in and around Washington there could be no movement made by our troops without the rebels being advised of it. So that we were never able to take them by surprise."²⁶⁷

In fact, Jackson was aware not only of the location and general size of the growing enemy threat across the Potomac but also deduced their probable intent. During his command of Harper's Ferry in 1861, Jackson had himself plagued Federal authorities by closing the railway to Washington. Using his own knowledge of the importance of that supply route, the Confederate commander logically concluded that the Federals would have to make some move to protect it against future interruption and that the road networks leading to Winchester would make it a natural objective. On 24 February he wrote to Gen. Johnston from his own headquarters in Winchester, "I have

²⁶⁷John Emerson Anderson, Manuscript. Memoir, 1861-1865. Manuscript Division, Library of Congress, Washington, D.C.

reason to believe that the enemy design advancing on this place in large force.¹²⁶⁸ This understanding of the enemy's intent rather than just his location or capabilities would allow Jackson to more effectively plan his next move.

To prepare for the expected enemy advance across the river, the Confederate commander began alerting his scouts to be especially vigilant in their observation of the Federal forces. On 25 February, letters were sent to his cavalry commanders directing them to "keep a sharp lookout to the front" and to report any movement without delay.²⁶⁹ Additionally, Jackson's recently assigned Chief Engineer, 1st Lt. Boswell, was dispatched to Harper's Ferry to examine the Federal positions there.²⁷⁰ Jackson was determined not to let the Federals surprise him with any quick thrust across the Potomac. Careful observation and rapid reporting of the enemy situation might also allow him to capitalize on any perceived Federal weakness or error.

On 27 February, the northern troops threw a pontoon bridge across the Potomac at Harper's Ferry and crossed into Virginia. The Federal advance had begun. McClellan was on hand to personally supervise the crossing because of its importance to the overall success of the Federal plan. Banks' entire division and two brigades of Sedgwick's division made the initial move into the enemy's territory.²⁷¹ Sedgwick's

²⁶⁸Jackson MS, Letters, 115.

²⁶⁹Ibid., 117. Dispatch from Jackson to Capt. G.W. Myers, commanding the cavalry scouts on the Pughtown Road, and Lt. Col. Ashby.

²⁷⁰Ibid., 119. Letter from Jackson to Capt. Baylor, the commander of Confederate forces near Harper's Ferry.

²⁷¹O.R., Vol 5, 48. McClellan's summary report of 1862 operations.

third brigade and two other divisions remained on the Maryland side to guard against any immediate tactical reverse (MAP 4).

Although the preliminary crossing of the infantry went well, problems soon arose with the movement of artillery and heavy supplies. Because the small pontoon bridge used by the foot soldiers was too light to allow the passage of heavy equipment, McClellan had ordered a number of canal barges for the construction of a more permanent bridge. However, when the barges attempted to pass up the Chesapeake and Ohio Canal, it was discovered that they were too wide to fit through the canal locks. No one had ever bothered to measure the barges or the canals! McClellan's engineers had simply trusted the advice of "...military railroad employees and others that the lock was large enough, and, the difference being too small to be detected by the eye, no one had thought of measuring it or suspecting any difficulty."²⁷² This oversight in simple analysis and planning would prevent an immediate push towards Winchester. While they waited for the assembly of artillery support and ample supplies, the Federals would satisfy themselves with lesser objectives for the near term.²⁷³

By the next day, 28 February, the Federal forces had sent a strong reconnaissance force to Charlestown and, finding that place free of enemy troops, occupied the town

²⁷²Ibid., 49. In all of his reports on this affair, McClellan continually downplays this oversight and cites the successful use of similar barges near Edward's Ferry, Virginia in 1861.

²⁷³Ibid. Despite the ensuing delay in a drive towards Winchester, McClellan states that he was "well satisfied with the results achieved by his force."

as a potential base for further operations. Lander's and Williams' divisions, which had crossed the Potomac after the initial push into Harper's Ferry, were advanced to Martinsburg and then to Bunker Hill.²⁷⁴ When McClellan departed the area to return to Washington later that day, Banks was again left in immediate operational command. Banks would delay any advance from Bunker Hill until he felt sufficient supplies and artillery had been brought up to support a movement by the majority of his forces on Winchester.

Born in Waltham, Massachusetts, Nathaniel Prentiss Banks, had used great energy and hard work to rise from humble beginnings to political prominence by mid-century. Called "The Bobbin Boy" in a popularized tale of his boyhood labor in a textile factory, Banks had capitalized on the growing northern interest in the temperance movement to gain election, in 1853, to the U.S. House of Representatives where he would serve a total of ten terms. In 1855 he was elected Speaker of the House after 133 ballots, the longest contest for that position in congressional history. Leaving the House in 1857, he was serving as the Governor of Massachusetts at the war's outset.²⁷⁵ In July 1861, Lincoln had appointed Banks to the rank of Major General, being junior only to Winfield Scott, John C. Fremont, and George B.

²⁷⁴Ibid.

²⁷⁵Congressional Quarterly Service, Guide to the Congress of the United States, Washington, D.C.; 1971. Banks served two congressional terms before the war and eight after the conflict. As a political opportunist, he was also willing to switch party alliances to capitalize on public opinion. He was a member at various times of five political parties: Coalition Democrats; American Party; Republicans; Union Republicans; and Liberal Republicans.

McClellan on the Army lists. Despite a rather soldierly appearance, however, Banks had absolutely no military training and about as little natural talent for the profession of arms. Appointed strictly for political purposes at a time when the north needed patriots to flock to the colors, Banks would generally prove himself to be both a poor administrator and operational commander.

Jackson had only about 4,600 men to counter the Federal threat in the Valley while also having responsibility for securing the left of Johnston's main army on the Manassas-Centreville line. The cavalry forces under Turner Ashby, which had been scouting and reporting Banks' advance, were far too few in number to oppose the enemy in open combat. In reply to Johnston's orders to keep his Valley force between the Federals and the main Confederate army, Jackson wrote on 3 March that this task would be difficult owing to the condition of the available road networks and geography of the region. Jackson did, however, suggest that he might be able to strike a "painful blow" against the enemy if the Confederates were forced to retreat up the Valley.²⁷⁶ Rather than strictly adhering to the moves of the main Confederate army, Jackson intended to retreat up the Valley only if pushed by a sufficient force of the enemy. Two days later, Johnston ordered all Confederate forces east of the Blue Ridge to fall back to the line of the Rapidan River.²⁷⁷

From his base at Martinsburg, Banks sent numerous scouting parties in the direction of Winchester to help update the enemy picture. The Federal effort,

²⁷⁶O.R., Vol. 5, 1088. Letter of 3 March 1862.

²⁷⁷Ibid., 1090.

however, was largely checked by the effective screening operations performed by Ashby's cavalry who repeatedly drove the Federal patrols back to their base. Those northern parties which succeeded in gaining information sometimes brought about false impressions that would hinder the Federal effort. One of the Federal patrols reported the presence of masked artillery batteries four or five miles in front of Winchester.²⁷⁸ Although the report may have been valid in the sighting of some artillery, it is probable that these masked batteries were, in fact, only the three gun battery of Chew's horse artillery, part of Ashby's command that, therefore, would have been well forward of any strong, prepared Confederate positions. The resulting fear of possible ambush or surprise attack by these concealed guns helped to slow the ensuing Federal advance on Winchester as pickets and flanking columns were deployed to meet the supposed threat.

On 5 March, Banks finally began a slow movement up the Valley towards Winchester from Bunker Hill. Two days later, Federal and Confederate cavalry skirmished lightly near Winchester but the Union troops were easily rebuffed. Although the southerners might delay the enemy movement, the Confederate commander knew that his ability to hold the town was limited. Jackson's chief quartermaster, Maj. John A. Harman, had begun preparing for a withdrawal from Winchester in late February. By the 26th he had already removed all clothing stores

²⁷⁸Charles H. Boyce, Manuscript. Papers and bound regimental history, 1861-1932. Manuscript Division, Library of Congress, Washington, D.C.

to Strasburg and was in the process of moving all ordnance as well.²⁷⁹ Additionally, captured supplies and material were also readied for the move south. Pvt. Worsham stated that "...even the locomotives and cars, that were captured at Martinsburg, were sent to the rear. Because the valley pike was such an excellent road he could do this... and they were hauled to Strasburg, a distance of about fifty miles, where they were put on the Manassas Gap railroad for the use of the Confederacy."²⁸⁰ Regiments that had been in camps at various sites in the vicinity were repositioned to allow for quicker concentration and possible movement. A private of Jackson's 2nd Brigade reported that his unit had been camped on the Berryville road "...until March 7th; at which time we marched through Winchester, and camped on the Staunton pike...."²⁸¹, the main improved turnpike that led south.

As the Federals continued their slow advance towards Winchester on 6 March, Jackson again reminded his cavalry commanders of their vital role in tracking enemy movements and thanked them for their previous efforts in doing so. The Confederate leader also made arrangements to ensure that his subordinate commanders would receive timely reports of enemy movements. In addition to the required daily reports to his own headquarters, Jackson also ordered that a copy of all scouting reports should be sent to the appropriate infantry brigade commander who was responsible for that given sector. The cavalry scouts on the Pughtown Road would send reports

²⁷⁹Harman MS. Letter from Maj. Harman to his brother in which the quartermaster also states that he is planning to move his supplies even further south.

²⁸⁰Worsham, 51.

²⁸¹Ibid., 50.

to Gen. Garnett while the reconnaissance commander on the Berryville Road, Capt. Scheetz, would forward his reports to Col. Fulkerson.²⁸² Accordingly, later that day, Scheetz informed both Jackson and Fulkerson that the enemy was continuing his slow advance up the south side of the Shenandoah River and that he would continue to closely monitor their progress.²⁸³ By his personal involvement in this collection effort, Jackson was emphasizing those elements of information which he, as the operational commander, considered important to the planning process. Additionally, by ordering dissemination of information to his subordinates, he had ensured that tactical commanders would be equally aware of any potential threat approaching their position.

In contrast to the alert actions of the Confederate cavalry during this period were the actions of the Federal horsemen. The Federal patrols seemed to lack the aggressive spirit that had enabled Jackson's men to keep him informed about enemy movements. Military commanders of the Civil War still relied heavily on the ability of cavalry to provide them with information regarding the enemy situation. Despite the advent of new collection assets such as observation balloons, telegraph intercepts, and widespread reliance on newspapers, the mobility and flexibility of cavalry forces in operational and tactical collection made them ideal in many situations. Any weakness in this arm could result in a corresponding weakness in intelligence

²⁸²Jackson MS, Letter 153. On orders from Jackson, aide Lt. Junkin sent this order to Lt. Col. Ashby on 3 March.

²⁸³Ibid. 154. Letter from Jackson's headquarters to Lt. Herbert who was destroying boats at Castleman's Ferry.

collection. On 7 March, Jackson told Ashby that some scouts had noted the Federal cavalry on the road between Charlestown and Summit Point to be especially negligent and that the "...day before yesterday were all asleep on their posts."²⁸⁴ Such apathetic dereliction of duty would never allow the Federal cavalry to keep Banks informed in a timely manner and would soon open them to criticism from their own commanders.

In the hopes that increased numbers would help him resist the slow moving Federal advance in the Valley, Jackson requested reinforcements from Johnston's main army.²⁸⁵ Johnston, however, was forced to largely ignore the request because of the worsening situation near Manassas. On 9 March, four days after he had issued orders for a withdrawal, Johnston pulled his infantry forces from the Manassas line and withdrew the remaining cavalry screen the following day.²⁸⁶ In uncharacteristically quick response to the Confederate movement, McClellan ordered all Federal forces, including those in the Valley, to advance.²⁸⁷

Despite the generally poor Federal intelligence collection effort to date, Banks still had a pretty good picture of the enemy forces waiting at Winchester. A captured sketch map of the Winchester defenses in the summer of 1861, updated through various collection means, provided the Federals with a detailed graphic showing

²⁸⁴Ibid., 157. This information was part of a dispatch to Ashby in which Jackson authorized the cavalry's destruction of a bridge.

²⁸⁵Clark, 65. Letter of 8 March to Johnston.

²⁸⁶Freeman, 140.

²⁸⁷Clark, 64.

entrenchments, artillery, and camp locations.²⁸⁸ Timely intelligence also became available on 9 March when Jacob Poisel, an eighteen year old private from the 2nd Virginia Regiment, deserted his unit and entered the lines of Williams' Division. In a debriefing that Gen. Williams transcribed and forwarded to Banks' headquarters, Poisel offered valuable information:

I left Winchester this morning. Jackson's Brigade of 5 Regts of Inft. were there: that was the whole of his Brigade. The Regts were the 2nd, 4th, 5th, 27th, & 33d Va. Regts - Neither Loring nor Elzey were there. There is no other cavalry around there except Ashby's. We were camped on the Pughtown side. I came across town to get out. The troops are encamped round about the town.²⁸⁹

The deserter further went on to describe the location of various entrenchments around the town and the camp locations of some units. The 3rd Arkansas and 14th Tennessee, two regiments that had been part of Loring's command, were reported to have departed the region about two weeks previous.²⁹⁰ With regard to arms and equipment, Poisel also stated that his own regiment was armed with outdated smoothbore muskets and that he estimated Jackson's force as having about twenty artillery pieces of both smoothbore brass and rifled iron types. While such information regarding the relative size, armament, and disposition of an enemy force could prove invaluable to an aggressive commander, Banks would do little to exploit

²⁸⁸Nathaniel Prentice Banks, Manuscript. Papers, 1841-1911. Manuscript Division, Library of Congress, Washington, D.C.

²⁸⁹Ibid.

²⁹⁰These two regiments, along with the 7th Tennessee, had left Jackson's command on 22 February and were transferred east of the Blue Ridge.

the opportunities offered by this intelligence windfall. In this case, intelligence failed to influence the cautious and plodding operational planning of the Federal commander.

By 11 March Banks' advance was forcing Jackson to make more detailed preparations for a retreat. Ashby's cavalry continued to report the location of the Federal troops and arrangements were finalized to move up the Valley. To prevent any rapid Federal push into the town, the 21st Virginia was formed in line of battle and artillery deployed on Fort Hill on the outskirts of the town. As Pvt Worsham reports, "These movements were occasioned by the enemy having crossed the Potomac, and it being reported that they would advance on Winchester. We marched through Winchester again, this time to the Martinsburg road, as we heard that the enemy were advancing on this road, and were not far off."²⁹¹ Despite these various movements and preparations, Banks was probably still unaware that the Confederates were ready to evacuate the town. Moreover, reconnaissance that day by a small body of Federal infantry pressed to within four miles of Winchester but failed to report any Confederate activity.²⁹²

During the night of the 11th, Jackson marched his troops out of Winchester, moving south along the Valley Pike. Ashby remained behind to delay the Federal

²⁹¹Worsham, 50-51.

²⁹²Charles Henry Tucky Collis, Manuscript. Volume of morning reports, 1861-1862. Manuscript Division, Library of Congress, Washington, D.C. Entry in company report book for 11 March states this movement was made by Capt. Collis and 20 selected men from his Zouaves de Afrique.

advance and "had no difficulty in keeping his troopers where they could report and could challenge every Federal move."²⁹³ Although Jackson had intended to launch an immediate surprise counterattack against Banks, his troops were marched further than intended before being placed into camp for the night. Consequently, the quick move back to Winchester envisioned by Jackson was now virtually impossible. Additionally, at a council of war held that night, Jackson's subordinates rejected any plans for a blow against the superior Federal numbers. Frustrated in all of his plans, Jackson angrily vowed "That is the last council of war I will ever hold."²⁹⁴ The next day, reconnaissance by Federal cavalry confirmed rumors from civilian sources that the Confederate infantry had evacuated Winchester.²⁹⁵ Banks brought up his troops, forced Ashby out of the town after a brief skirmish, and occupied his objective while Jackson continued to move south towards Strasburg.

Throughout the Federal advance on Winchester, Jackson had handled his intelligence effort capably. Possessing the numerically weaker force, he had foreseen the need to keep abreast of the enemy situation as a means of recognizing military opportunities and potentially exploiting enemy weaknesses. To fulfill collection against his own perceived requirements, Jackson had personally issued instructions to subordinate commanders and potential intelligence collectors and had also demanded rapid dissemination of key information to his own headquarters and

²⁹³Freeman, 311.

²⁹⁴Ibid., 306.

²⁹⁵Boyce MS.

subordinate commands. Confederate scouts and patrols were aggressively pushed forward to gain and maintain observation against the enemy allowing for a near-constant tracking of major Federal elements. For Jackson, the result of these actions was a clear understanding of Federal intentions, objectives, and disposition of forces towards achieving those goals.

In contrast, Federal intelligence efforts in the developing campaign were mediocre. Possessing what he knew to be a numerically superior army, Banks simply used a slow, methodical advance towards Winchester in which the overwhelming weight of his army would overcome any Confederate resistance. Reconnaissance by various cavalry and infantry units was haphazard. Patrols often returned to camp without having made contact with the enemy rather than aggressively pushing forward until they had located a Confederate position. Those scouting reports that reached Banks were spotty in periodicity and lacked the confirmation offered by more constant observation. Despite detailed, timely, and confirmatory information offered by captured documents and deserters, no attempt was made to capitalize on these potential intelligence windfalls with a rapid drive towards the objective.

B. KERNSTOWN

Following the Federal occupation of Winchester, changes were already underway to the operational situation. In an effort to concentrate forces east of the Blue Ridge for what was intended to be the main area of operations, Federal forces in the Valley were to be withdrawn and moved east. On 14 March, only two days after the Federal occupation of Winchester, Sedgwick's division left Banks' command and began their

march east to join McClellan's main army.²⁹⁶ Within the week, Williams' division also departed the Valley for the east. With their aggressive scouting and patrolling, Ashby's cavalry consistently noted these enemy movements and reported the departure of these large bodies of men to Jackson. The Confederate commander, constantly concerned with operational security even within his own command, typically listened to these reports with a stoical countenance, thereby revealing none of the potential importance of the information he had received. A member of the Stonewall Brigade recalled seeing Jackson receive some of these reports:

I have seen couriers bring dispatches to him which he would read, write out something, hand it back to them and not open his mouth to speak during the time. I have seen some of his aides and staff officers ride up to him, when he was sitting on the 'Old Sorrel' viewing the country, and tell him something about the lines, or about something of importance, and he would calmly sit there for a few minutes, then turn his horse and ride slowly away, his staff following, without his uttering a single word.²⁹⁷

While Federal forces in the Valley were diminishing, Jackson tried to strengthen his forces both quantitatively and qualitatively. Several Virginia militia regiments were mustered into Confederate service in Staunton on 17 March and reported to Jackson's army two days later. By 18 March, the Confederates had reached Mt. Jackson and had gone into camp two miles above that village on Rude's Hill. Pvt.

²⁹⁶Clark, 66.

²⁹⁷John O. Casler, Four Years in the Stonewall Brigade (reprint, Wilmington, North Carolina: Press of the Morningside Bookshop, 1981) 128. This work, written by a private soldier who served in the Stonewall Brigade throughout the war, is valuable for its realistic portrayal of the realities of soldiers' lives and perceptions during the war.

Worsham of the 2nd Brigade relates that "The enemy had followed us slowly, but at Mt. Jackson stopped, and retired down the valley."²⁹⁸ For the next several days Jackson rested his troops and consolidated the new units into his command. Drill, resupply, and arming of the new troops made up the regimen of Jackson's staff during this relative lull in activity.

On the 20th and 21st, the 7,000 Federals of Shields', formerly Landers', division (TABLE 3A) were falling back towards Winchester from Strasburg²⁹⁹ in preparation for that unit's planned movement east. Ashby, who had been watching the Federals at Strasburg, reported the move to Jackson by courier³⁰⁰ and then set off in pursuit of the foe with one cavalry company and his single artillery battery of three guns.³⁰¹

In the wake of Sedgwick's and Williams' departure, the withdrawal of Shield's division would leave only one division, that of Banks, remaining in the Valley.

Early on the 21st, Jackson had been examining his position at Rude's Hill with his chief engineer, Lt. Boswell, and had dispatched Boswell to examine the area around New Market as an alternate defensive site should the Federals push further south.³⁰² When Ashby's courier reached Jackson and informed him of the Federal movement towards Winchester, the general immediately recognized the opportunity that was

²⁹⁸Worsham, 51.

²⁹⁹O.R., Vol. 12, Pt. 1, 339. Post-battle summary report of Brig. Gen. James Shields.

³⁰⁰Ibid., 380. Jackson's general report of actions at Kernstown.

³⁰¹Ibid., 385. 26 March after-action report by Ashby.

³⁰²Jedediah Hotchkiss, Make Me a Map of the Valley, ed. by Archie P. McDonald (Dallas: Southern Methodist University Press, 1973) 6.

presented. If he could fall upon an isolated part of the withdrawing enemy, Jackson might be able to strike the "painful blow" that he had enthusiastically written Johnston about.³⁰³ The troops were placed in readiness for a rapid movement against the Federals. "On the night of March 21st," relates Pvt. Worsham, "we received orders to cook three days' rations, and be ready to move at early dawn the next morning."³⁰⁴

Jackson's force (TABLE 3B) started after the enemy at a brisk pace early the next morning, 22 March. "We marched twenty seven miles, stopped near Fisher's Hill and bivouacked for the night"³⁰⁵ reported Pvt. Worsham. While the rest of the army was marching north, Ashby's troopers were closely pressing the withdrawing Federals. At 2:00 p.m., Maj. Paldi of the 1st Michigan Cavalry reported to Shields the presence of an unknown enemy force about two miles south of Winchester.³⁰⁶ Three hours later, the Confederates advanced, driving in the enemy's pickets. In response to Ashby's annoying probes, Shields dispatched a brigade of infantry and two artillery batteries to the scene. The Confederates were easily driven off in the artillery duel that ensued although Shields was also wounded in the brief fight. More importantly, however, Shields had been able to brush aside the Confederates with the deployment

³⁰³O.R., Vol. 5, 1088.

³⁰⁴Worsham, 52.

³⁰⁵Ibid., 52.

³⁰⁶O.R., Vol. 12, Pt. 1, 355. 27 March report of Col. Thornton Brodhead, Federal cavalry chief.

of only two of his infantry regiments in sight of the enemy.³⁰⁷ The true size and location of the Federal main body was still unknown to the southern soldiers.

Following the skirmish that day the Federals simply fell back to Winchester and, again, Ashby followed. Early that evening the Confederate cavalry was able to push within a mile of Winchester and learned from a group of civilian informants that the only Federals present in the town were a rear guard consisting of four infantry regiments and a small detachment of cavalry and artillery. It was further relayed that this force had orders to depart for Harper's Ferry in the next several days.³⁰⁸ Ashby dispatched a courier to Jackson with this new information and then withdrew his forces back to the site of that day's fighting. Believing that the Confederates would probably resume some type of hostile action to follow up Ashby's harassment, Shields used the cover of darkness later that night to conceal his movement of forces south of Winchester. Kimball's brigade was moved about three miles up the Valley Pike with Sullivan's brigade following in support. Tyler's brigade and Brodhead's cavalry were meanwhile kept in reserve near Winchester.³⁰⁹

Shields' perception of the terrain was the guiding factor in the Federal deployment:

Winchester is approached from the south by three principal roads: The Cedar Creek road on the west, the Valley turnpike road, leading to Strasburg, in the center, and the Front Royal road on the east. There is a little village called Kernstown on the Valley road, about 3 1/2 miles from Winchester. On the west side of this road, about half a mile north of Kernstown, is a ridge of high

³⁰⁷Ibid., 339. Shields' summary report of 29 March.

³⁰⁸Ibid., 385.

³⁰⁹Ibid., 339.

ground, which commands the approach by the turnpike and a part of the surrounding country. This ridge was the key-point of our position. Here Colonel Kimball, the senior commander on the field, took his station. Along this ridge, Lieutenant Colonel Daum, chief of artillery, posted three of his batteries, keeping one battery in reserve some distance in the rear.³¹⁰

Early the next morning, Ashby renewed the skirmish of the previous day. Three companies of the 2d Virginia and one company of the 27th Virginia had been sent forward by Jackson to act as infantry support for Ashby's guns and these units also joined in the fight.³¹¹ The strength of the Federal position soon became apparent as Ashby related that "...after firing a few shots and pressing in the direction of Winchester with cavalry, I learned that the enemy was increasing his force and intended to make a stand."³¹² Although Ashby was aware that the Federal force was larger than the two regiments he had faced on the 22d, he may not have been convinced as yet that the information received from the civilians the night before had been a gross underestimation.

In contrast to Ashby's recognition of growing enemy resistance, by 8:00 a.m. the Federals were still only aware of the small cavalry force opposing them. Anxious to determine Confederate intentions, an hour later Shields dispatched Col. John S. Mason of the 4th Ohio on a personal reconnaissance of the enemy positions. After a ride around both flanks of the Confederate position as well as a thorough examination of the center, Mason reported his findings to both Shields and Banks.

³¹⁰Ibid.

³¹¹Ibid., 389. Report of Capt. J.Q.A. Nadenbousch, 2d Virginia Infantry Regiment.

³¹²Ibid., 385.

The Confederate position was well selected allowing for ample maneuver while also using the woods and high ground to mask movements. Ashby's troops were still the only enemy present. Presented with this information, Shields and Banks both concluded that no major Confederate attack would occur that day.³¹³ Banks departed for Harper's Ferry where he would await a train to take him to Washington, while Shields retired to his quarters to recuperate from his wounds of the previous day.

On the morning of 23 March, while Ashby was skirmishing with the Federals, Jackson's army resumed its march north. Garnett's Stonewall Brigade led the line of march followed by Fulkerson and Burks.³¹⁴ The 48th Virginia, under Col. Campbell, was employed as the rear guard and moved well behind the rest of the column. For junior officers and the men in the ranks the situation was anything but clear. Jedediah Hotchkiss, an acting adjutant in the Augusta County militia wrote in his diary - "We have any number of rumors but know nothing."³¹⁵ Pvt. Worsham of the 21st Virginia believed the "...march was to find out what they were doing. It was ascertained that they had made a stand at Kernstown."³¹⁶ While on the march, Jackson received Ashby's courier and the civilian reports from Winchester.³¹⁷ Here

³¹³Ibid., 340. Shields and Banks conferred for some time, analyzing Mason's report and other available information, before arriving at this conclusion.

³¹⁴Hotchkiss, 8.

³¹⁵Hotchkiss, 8.

³¹⁶Worsham, 53.

³¹⁷O.R. Vol. 12, Pt. 1, 381. Jackson notes that he had considered all previous reports submitted by Ashby to be "remarkable in their reliability".

was information that Jackson wanted to hear. A small body of the enemy was in an exposed position, isolated from support, and might offer an opportunity for successful engagement.

Jackson spurred his force onward at an even greater pace. The little army "...reached Barton's Mill, about noon, having marched about sixteen miles"³¹⁸, and found Ashby already engaged in a slow artillery duel with the enemy.³¹⁹ From their halted position on the turnpike, Jackson's troops could easily see Federal batteries on the ridgeline in the distance. This also meant, however, that the Confederate column was open to complete observation by the Federals.

Because of the rapidity of the march and the resultant straggling, Jackson's present forces consisted of only about 3,000 infantry, 290 cavalry, and 30 guns.³²⁰ Although the Confederate commander had initially planned to put his troops into camp to await the arrival of stragglers and the rear guard, the realization that his column had arrived in plain sight of the enemy led Jackson to opt for immediate action. The opportunity offered by what he believed to be an isolated, numerically inferior enemy could not be ignored. Maj. Jones, of the 2d Virginia, was known to be familiar with the surrounding area and was therefore dispatched to headquarters to assist Jackson and his staff. Without consulting any subordinates or reconnoitering the field beyond

³¹⁸Worsham, 52.

³¹⁹O.R., Vol. 12, Pt. 1, 385.

³²⁰Ibid., 383. Although Jackson excuses the low number of cavalry as being caused by hard campaigning, poor discipline may also have contributed to the small cavalry presence. Jackson places the number of his forces engaged as 2742 infantry, 290 cavalry, and 18 guns.

his present vantage point, Jackson began to deploy his troops for battle. The ground on the right appeared to be too open for the necessary deployment of infantry and Federal artillery commanded that part of the field. Ashby's small force was ordered to hold the right with elements of Burk's Brigade in support. The 5th Virginia, Garnett's largest regiment, was retained by Jackson as the general reserve.³²¹

The main thrust was to be made on the left (MAP 5). As Garnett's and Fulkerson's brigades accordingly filed off of the turnpike and move towards the left, the 27th and 21st Virginia were deployed as skirmishers and thrown forward to oppose their Federal counterparts. Pvt. Worsham of the 21st Virginia reported that as soon as the skirmishers moved forward, "...we came in sight of the Yankee line of battle near Kernstown, and a battery posted on a hill a little in the rear. The battery opened on us at once."³²² To provide some counter-battery fire while his forces got into position, Jackson dispatched the three batteries attached to Garnett's brigade to the slight ridgeline on the left³²³ and placed the 1st Virginia (Irish) Battalion in support of the guns.³²⁴

Due to the arrival and deployment of Jackson's column in full sight of the Federals, Col. Nathan Kimball, the senior Federal officer on the field, had been able to respond to the developing threat. Soon after noon he had reported the presence of

³²¹Ibid., 381.

³²²Worsham, 53.

³²³O.R.; Vol. 12, Pt. 1, 381.

³²⁴Ibid., 405. Report of Capt. D.B. Bridgford states that this move was made about 3:00 p.m.

increased enemy infantry in the woods on his left³²⁵ to Shields. Sullivan's brigade was accordingly moved forward to secure the Federal left.³²⁶ Capt. Keys' Pennsylvania cavalry was deployed to secure and observe both Federal flanks.³²⁷ Shields also telegraphed Banks at Harper's Ferry of the increased enemy presence, leading the later to delay his departure to Washington.

The Confederate flanking column on the left moved about half a mile before deploying into line of battle.³²⁸ Fulkerson's Brigade formed on the left of the 27th Virginia, which had reformed into regimental line of battle after its deployment as skirmishers, while Garnett moved his brigade to form the center of the Confederate line.³²⁹ The 21st Virginia remained deployed as skirmishers forward of the main southern position. As the Confederates began their advance, they quickly began to press towards the Federal artillery posted on the opposite ridge.

Kimball had seen the Confederate deployment on his right, however, and had already begun to shift forces to repel the enemy advance. Although Lt. Col. Philip Daum's artillery was delaying the Confederate drive towards the Federal line, it

³²⁵Perhaps the companies of the 2d and 27th Virginias acting as support to Ashby's guns.

³²⁶O.R., Vol. 12, Pt. 1, 340.

³²⁷Ibid., 358. Reports of Capt. John Keys, commanding the Pennsylvania cavalry, and Capt. A.J. Greenfield, commanding the Washington Cavalry Squadron of Keys' unit.

³²⁸Ibid., 394. Report of Col. Arthur C. Cummings, commanding officer of the 33d Virginia Infantry Regiment.

³²⁹Ibid., 382.

would need infantry support to avoid being overwhelmed. Two regiments of Tyler's brigade, the 7th Ohio and 7th Indiana, were quickly moved to the scene.³³⁰ A couple hours later, at around 4:00 p.m., Tyler's three remaining regiments were also moved from their position on the Federal left to meet the Confederate threat on the opposite end of the line.³³¹

Throughout the developing battle, Kimball had kept Shields, who was still in Winchester recuperating from his wounds, informed about the situation on the field. Through the energies of Lt. William W. Rowley, the Federals had established an effective communications system that allowed for the transmission of information and orders between Kernstown and Winchester as well as on the battlefield itself. Using signal flags as the means of communication, Rowley had set up a series of stations which linked the two wings of the Federal force with Kimball's headquarters near the center and then further linked the senior commander on the field with Shields, about three miles away. Rowley also detailed several flagmen to accompany the infantry brigades as they maneuvered on the field, thereby providing a way to keep Kimball informed about the progress of his subordinates on the battlefield.³³²

Initially the Confederate attack seemed to be going well. Kimball's brigade was

³³⁰Ibid., 375. Tyler reports this movement as occurring about 2:00 p.m.

³³¹Ibid., 341. In his account of the battle, Shields offers much praise for his subordinates in flawlessly accomplishing these deployments.

³³²Ibid., 352. In his official report, Lt. Rowley, an acting signal officer on detached service from the 28th New York, complains of a general lack of recognition from senior officers for the services provided by the signalmen and requests to be returned to his own regiment.

hard pressed by Garnett's and Fulkerson's advance and one Federal regiment was even seen in withdrawal by men in the Confederate ranks. As they neared the military crest of the ridge they had been advancing against, however, the skirmishers of the 21st Virginia, moving forward of the main battle line, came into full sight of the enemy's line of battle which now was also advancing. Tyler had arrived on the scene. Upon seeing the five Federal battle flags, one for each regiment in Tyler's brigade, advancing against them, the Confederate skirmishers quickly fell back to the main body which had posted itself behind a low stone wall.³³³

Although Tyler's brigade had easily driven in the enemy skirmishers, the strength of the Confederate position now prevented any further advance by the Federals at that time. With the two sides locked in a tactical stalemate in which neither could dislodge the other, Kimball now took action to break the deadlock. Leaving Sullivan with only one regiment, the 39th Illinois, and two artillery pieces to hold the entire Federal left, Kimball ordered the 5th Ohio, 13th Indiana, and 62d Ohio to reinforce Tyler's left.³³⁴ Additionally, from his own brigade Kimball placed the 14th Indiana, 84th Pennsylvania, and several companies of the 67th Ohio and 8th Ohio regiments to the right of Tyler's men (MAP 6).³³⁵

From his position on a small rise behind the Confederate lines, Jackson could apparently see nothing of the enemy lines or the massing of troops opposite

³³³Worsham, 54.

³³⁴O.R., Vol. 12, Pt. 1, 371. Sullivan's after-action report of the battle.

³³⁵Ibid., 341.

Fulkerson and Garnett. Additionally, Confederate cavalry under Maj. Funsten, which had been posted on the extreme left to observe any Federal movement on that side, had failed to report the enemy concentration to the Confederate general.³³⁶ As the enemy fire facing his center grew increasingly hotter, Jackson ordered one of his aides forward to reconnoiter the front. Upon his return to the commander the aide reported an estimated 10,000 Union troops confronting them. To this disquieting news Jackson reportedly replied with stoic detachment, "Say nothing about it. We are in for it."³³⁷

Tyler now started his advance against the Confederate lines. Of the 13 Federal infantry regiments on the field, 12 would be taking part in this main assault against the enemy's left. At this crucial period in the battle, when the full firepower of the Confederate line would be needed to resist the enemy, the men of Garnett's brigade began to run out of ammunition. Southern soldiers began to fall back towards the rear, first as individuals and then in groups, as the last rounds disappeared from their cartridge boxes. Seeing little alternative to the terrible reality facing him, Garnett ordered a withdrawal. The movement of Garnett's brigade in turn left Fulkerson's right open to enfilading fire from the still advancing Federals and he too was forced to order his men back.³³⁸ When Jackson saw his troops streaming to the rear he was

³³⁶Ibid., 387. In his account of the battle, Maj. Funsten also points out that his troopers had failed to inform even him of the sightings of the Federals on the left.

³³⁷Clark, 70. This may be a popularized tale since Jackson is purported to have made a similar statement at Manassas in 1861.

³³⁸O.R., Vol. 12, Pt. 1, 382. Jackson placed most of the blame for the Confederate withdrawal and defeat on Garnett who, he believed, should have resorted to use of the bayonet when ammunition ran out.

furious. He had not ordered a withdrawal. From his detached command post behind the Confederate line, Jackson was unaware of the actual condition of his units at the front. He quickly ordered his reserve, the 5th Virginia, to move forward and delay the Federals and then he too rode forward to investigate the situation himself. While moving to the rear, however, Garnett encountered Col. Harman, the reserve commander, and ordered him to form a defensive line where he was.

With the collapse of the entire Confederate left, Ashby and Burks were also forced to fall back to avoid envelopment by the still advancing Federals. With little pressure from Sullivan's lone regiment, the Confederate right was able to withdraw in good order and maintained complete cohesion as an effective combat element. The 42d Virginia, of Burk's brigade, soon moved to Harman's right and, with Ashby's force in support, the two infantry regiments were able to finally halt the Federal thrust.³³⁹

As darkness began to fall over the field, the Confederates moved back up the Valley Pike. Jackson retreated about five miles south before taking up a new position and bivouacking for the night.³⁴⁰ Only now did the 48th Virginia rejoin the rest of the army after its rear guard duty on the march from Mt. Jackson.³⁴¹ While Jackson

³³⁹Ibid., 382. Jackson offered ample praise to the 42d Virginia for their actions with the rear guard.

³⁴⁰Ibid., 341. Shields further stated that darkness was all that prevented a Federal pursuit that night.

³⁴¹Ibid., 382. The movement of this regiment in rejoining the rest of the army was probably delayed by their efforts in rounding up the stragglers along the route of march.

moved the infantry south, Ashby and his cavalry maintained the rear guard to prevent further pursuit by the Federals.

Neither Shields nor Kimball, however, were inclined to an immediate pursuit. Fearing that Jackson was actually on the verge of reinforcement by up to 15,000 fresh troops³⁴², Shields opted for initial caution. He ordered all outlying units and pickets to assemble near Kernstown and prepared to continue operations against the enemy at dawn the next day. Additionally, during the course of the battle, Shields had also wired to Banks in Harper's Ferry requesting the return of Williams' recently departed division to the Valley. Williams' 1st Brigade arrived on the scene at Kernstown just as Tyler was forcing the Confederate retreat and the 3rd Brigade reached the battlefield the following day.³⁴³

Following the battle, both commanders tended to over-estimate the size of the enemy that they had opposed and the damage inflicted upon their opponent. In initial reports to Banks, Shields estimated the size of Jackson's force as 11,000 - 15,000.³⁴⁴ Although the Confederates were less than half this number (TABLE 3B), the Federal commander's perception of the situation contributed to the cautious pursuit of the enemy following the battle. Some of this overestimation was due to the deceptive efforts of Confederate prisoners who consistently inflated their numbers

³⁴²Ibid., 341.

³⁴³Ibid., 378. Taken from abstracts of the "Record of Events" for Williams' Division, 5th Army Corps.

³⁴⁴Ibid., 336. In addition to the inflated troop figures, Shields also referred to Jackson's forces as the "flower of the southern army."

during questioning by the Federals. Not all of the prisoners' stories were entirely convincing, though. After questioning Lt. Junkin, an aide on Jackson's staff who had been captured, Banks related that it was "Reported by rebel Jackson's aide that they were assured of re-enforcements to 30,000, but we don't credit it."³⁴⁵ Additionally, the Federal division commander showed confusion over which enemy commands he had engaged. Shields' initial reports indicated that he thought he had defeated forces under Kirby Smith and James Longstreet, both of whom were still east of the Blue Ridge, as well as Jackson's command.³⁴⁶ In contrast, Jackson seemed to have a closer approximation of his foe's size as he believed that about 11,000 Federals were present at Kernstown and that 8,000 of these were actually engaged against him.³⁴⁷ If he was including the recently arrived troops of Williams' 1st Brigade in his calculations, Jackson's surmise seems fairly close to the facts (TABLE 3A). Both belligerents, however, over-estimated the casualties suffered by the enemy. Although the actual combined casualties for both sides numbered slightly over 1300 (TABLE 4) Shields estimated the southern loss as 1350³⁴⁸ while Jackson believed that the Federals had lost 1000 - 1500 men.³⁴⁹

³⁴⁵Ibid., 18.

³⁴⁶Ibid., 335.

³⁴⁷Ibid., 380.

³⁴⁸Ibid., 336.

³⁴⁹Ibid., 380. Jackson was relying on information from the citizenry of Winchester as the primary basis for this estimate.

Confederate intelligence at Kernstown had been dismal. Jackson's operational goals had dominated his assessment of the enemy situation and had caused him to commit his forces to battle without understanding the reality of the Federal forces facing him. The initial intelligence gaps that had occurred when Shields began his retreat from Strasburg back to Winchester had not been resolved by the time the battle began. Instead of waiting for Ashby to provide a more concrete assessment of Federal dispositions, Jackson had relied on civilian reports, always of questionable validity, as the basis for his operational planning. After his arrival on the field, Jackson had continued this general detachment from operational and tactical reality. Although he lacked tactical information on the terrain and enemy situation, the Confederate commander deployed his troops and planned his attack without a prior reconnaissance by either himself or a trusted subordinate. As combat raged at his front, Jackson appeared to be out of touch with the battle being fought and never actually understood the threat developing on his left. Finally, his inflexibility in meeting the Federal assault revealed a general unwillingness to recognize an enemy situation that was contrary to his own preconceived operational decisions.

The Federals, on the other hand, had made good use of intelligence at Kernstown. In the wake of Ashby's pursuit and the skirmishing on the 22d, Shields had correctly deduced Confederate intentions and, on the night of the 22d, had positioned his forces to meet a possible increased threat from the south. Although the Federal commander had concluded early on the 23d that no battle would occur that day, the arrival of Jackson's force in plain sight of the Federal lines provided concrete details of the

enemy's relative size and deployment. Lt. Rowley's imaginative and energetic signaling efforts allowed Federal commanders to stay abreast of the tactical situation at the front of battle and to react accordingly. Additionally, Federal actions illustrated a flexibility in reacting to and capitalizing on opportunities suggested by the latest information.

C. THE FEDERAL PURSUIT

At around 8:00 a.m. the day after the fight at Kernstown³⁵⁰, Jackson began his retreat up the Valley. The pace was "slow and sullen"³⁵¹ as the Confederates grudgingly moved back over the ground they had rapidly advanced on the day before. Despite pressure from the enemy on the column's rear, the various brigades were allowed to halt at midday to cook their rations.³⁵² Ashby commanded the rear guard with typical zeal and fought a delaying action throughout the day, keeping Jackson informed of the Federal pursuit. So close were the pursuers, however, that little reporting was needed to know the location of the enemy advance. Even soldiers in the ranks were clearly aware of the tactical reality - "The enemy were in hot pursuit, we could hear firing in the rear all day, and from some high points we could see the

³⁵⁰Hotchkiss, 9.

³⁵¹Worsham, 55.

³⁵²Hotchkiss, 9.

enemy during the march.³⁵³ By nightfall the Confederates had reached the area between Narrow Passage and Woodstock where they went into camp (MAP 7).³⁵⁴

Although the Federals had initially pressed the retreating Confederates with some energy on the 24th, the pursuit soon became more measured. By 25 March the Federals had reached Tom's Brook, four miles south of Strasburg, where they were again met by Ashby.³⁵⁵ The main body of northern troops would remain here until 1 April, constantly watched and harassed by Ashby's scouts. Although the northern troops did make some attempts at armed reconnaissance of the area, they never aggressively sought out their enemy. Typical was a Federal patrol to Middleburgh on 27 March in which a force consisting of Collis' Zouaves, the 11th Indiana, 13th Massachusetts, a detachment of the 1st Michigan Cavalry and two pieces of artillery simply returned to Tom's Brook after failing to make any contact with the Confederates.³⁵⁶ Rather than using this intelligence collection effort to aggressively locate the enemy, Banks was sending Federal patrols to perform reconnaissance of geographic areas that really weren't important to the Federal operational picture. A more capable commander might have used this sizeable force to gain and maintain contact with some element of the enemy. Instead, Jackson was able to remain relatively unbothered in his camp near Narrow Passage until 28 March although he

³⁵³Worsham, 57.

³⁵⁴Hotchkiss, 10.

³⁵⁵Ibid..

³⁵⁶Collis MS. Capt. Collis states in his morning report book that the patrol objective was only about 6 miles distant from the Federal camp.

occasionally sent some of his infantry towards Woodstock to rebuff small Federal advances.³⁵⁷

During this respite at Narrow Passage and his subsequent camp at Rude's Hill, Jackson began the reorganization of the forces under his command as well as the improvement of his own operational planning. On 1 April, still incensed by what he considered to be the premature withdrawal of the Stonewall Brigade at Kernstown, Jackson relieved Garnett from command and replaced him with Brig. Gen. Charles Winder.³⁵⁸ Col. John Campbell of the 48th Virginia was assigned the command of the 2d Brigade³⁵⁹ after Col. Burks was forced from active operations by sickness and, on 13 April, Brig. Gen. William B. Taliaferro returned to the Valley on orders from Johnston to assume command of the 3d Brigade.³⁶⁰ The regimental assignments to the various brigades remained as they had been previously and Ashby retained control of the cavalry arm.

The Confederate commander also sought to improve the assets available for his own operational planning. One of the most significant steps made towards this end occurred on 26 March when Jackson summoned a young militia officer, Jedediah Hotchkiss, to headquarters. After asking Hotchkiss about the topographic work that he had performed during the campaign in West Virginia the previous year, Jackson

³⁵⁷Worsham, 57.

³⁵⁸Jackson MS, General Orders, 34.

³⁵⁹Jackson MS, General Orders, 36.

³⁶⁰Hotchkiss, 10. Diary entry for 13 April.

issued orders that would provide an intelligence force multiplier in the months to come:

I want you to make me a map of the valley, from Harper's Ferry to Lexington, showing all the points of offense and defense in those places. Mr. Pendleton will give you orders for whatever outfit you want. Good morning sir.³⁶¹

"This," relates Hotchkiss, "was the beginning of my career as the Topographic Engineer" on Jackson's staff.³⁶² As late as April, Jackson himself remained confused over the names of the various gaps that crossed the Blue Ridge but he could now rely on the knowledge of his assigned topographer in helping to dispel this confusion.³⁶³ The engineer not only provided numerous maps which showed the pure geography of the area but also offered his own valuable assessments and advice regarding the operational significance of various features throughout the Valley.

Jedediah Hotchkiss had been born and raised in Windsor, New York, the descendant of an old Connecticut family. Following his graduation from local academies and a brief job as teacher to miners' children in Pennsylvania, Hotchkiss took a walking tour of Virginia and decided to settle there at age 19. Serving first as a private tutor in Augusta County, he was soon named principal of the Mossy Creek Academy. In the fall of 1859 the enterprising young man established the Loch Willow Academy, a venture which quickly proved to be financially successful. Intrigued by

³⁶¹Ibid.

³⁶²Ibid., 11.

³⁶³Freeman, 321.

various aspects of geology and geography he had encountered during his tours in New York, Pennsylvania, and Virginia, Hotchkiss used the valuable leisure time from his busy teaching schedule to learn the principles of engineering and cartography. It was the self-taught mastery of these skills that made him such an asset to the Confederate cause in the years to come.

With the outbreak of the war, Hotchkiss closed his school and offered his services to the newly formed Confederate army. In July 1861 he began topographic duties with the southern forces at Rich Mountain in western Virginia. Although that campaign ended dismally for the south, Hotchkiss produced many maps to replace the outdated ones previously in existence and provided valuable assistance to the area commander. Forced home after a bout with typhoid, the engineer had just returned to duty in mid-March as acting adjutant of the Augusta County militia. Col. W.H.S. Baylor, Jackson's inspector general, informed his chief of the engineer's presence and Jackson quickly added Hotchkiss to his staff.

Hotchkiss went to work almost immediately on his assignment. On 27 and 28 March he examined the area around Narrow Passage, where the Confederates had been camped since the 24th, and reported to the commanding general that it was undefensible. "My reconnaissance showed that the position could be easily turned by several roads and that it would be difficult for any army to speedily fall back...." if attacked there.³⁶⁴ By this simply stated assessment Hotchkiss had provided his general with a useful interpretation linking analysis of the military geography with

³⁶⁴Hotchkiss, 13.

the commander's operational planning. Jackson accepted the engineer's assessment as conclusive and that day ordered the army south to new positions at Mt. Jackson.³⁶⁵

As part of his overall mapping project, Hotchkiss continued to visually survey the area around the army. On 29 March, he enlisted the assistance of a Mr. Hoshour of Woodstock who acted as guide while examining the country in front of the army from Massanutten to North Mountain. Although Hotchkiss found the reconnaissance greatly expedited by a guide familiar with the area and the local inhabitants, he discovered no defensible position near Woodstock that couldn't be easily turned by an active enemy.³⁶⁶ The following day Sgt. S. Howell Brown, a former surveyor from Jefferson County, joined Hotchkiss in his work of exploration and mapping. After a thorough examination of the vicinity, Hotchkiss recommended the line of Stoney Creek as a favorable point of defense. Using a quickly produced sketch map of the area, the engineer explained the advantages of the position and advised his chief to make a stand there. Again Jackson acted in accordance with the advice of his staff officer and ordered Ashby to hold at Stoney Creek.³⁶⁷

The final resulting product of Hotchkiss' labors was an outstanding example of a map designed to meet the needs of an operational commander and his campaign planning. Measuring approximately 100 inches x 40 inches at a scale of 1:80,000 the

³⁶⁵Worsham, 57.

³⁶⁶Hotchkiss, 13-14.

³⁶⁷Ibid., 15.

map was, in fact, a comprehensive representation of the length and breadth of the Valley. The relief features of valleys, hills, mountains, and vital gaps were clearly depicted in black contour and accurately labelled to avoid any confusion. The various rivers, tributaries, and creeks, with their even more critical bridges were also painstakingly illustrated. The intricate network of horse paths, country roads, and improved turnpikes, often confusing even to local inhabitants, were examined in detail and then charted in red with many accompanying comments on road conditions. Additionally, the locations and names of numerous inhabitants, mills, and furnaces were provided throughout the map allowing for quick determination of local directions or reference points.³⁶⁸ Armed with this detailed map and the analytic capabilities of his cartographer, Jackson could now plan his movements to take full advantage of the natural and man-made geography within his area of operations.

In contrast to the comprehensive map initiated, produced, and used by the Confederates, the Federals were operating in an area that largely remained a mystery to them. Military or government produced topographic maps of the region were virtually non-existent. Commercially available maps were often mere overviews of the area showing only major towns, improved turnpikes, larger rivers and the general trace of mountain ranges. Most examples were also long outdated. Federal engineers were generally restricted in their efforts to explore the Valley for mapping because of enemy control over the region. While on a mapping expedition in the Valley

³⁶⁸Jedediah Hotchkiss, Maps, H89. Maps and field books, 1861-1865. Map and Geography Division, Library of Congress, Washington, D.C.

during the spring of 1862, engineer William Luce and his whole surveying party were captured by Ashby's men. The contents of Luce's 180 page field book, which might have provided key information to Banks, was turned over to Hotchkiss for inclusion into his own work.³⁶⁹ Other Federal sketch maps fell far short of Hotchkiss' products. Instead of contours, very generalized verbal descriptions were often offered to depict elevation and slope of the terrain. Although the main Valley turnpike was well examined, the numerous crossroads were usually only partially labelled and remained largely unexplored.³⁷⁰ Throughout the campaign, Federal cartography remained rough, disorganized and ineffective in assisting northern commanders with an understanding of key military terrain in the Valley.

On 1 April, the slow moving Federal forces succeeded in pushing the Confederate cavalry through Edenburg. Ashby's commanding position on the high ground at Stoney Creek and his burning of the bridge over that watercourse prevented any further advance by his foes.³⁷¹ With some support by various infantry units, Ashby was able to hold this position against the enemy for the next two weeks despite almost daily skirmishing. The ever daring Ashby consistently remained in the forefront of the action at this position, often riding out in front of his own lines to view the enemy from some vantage point³⁷² and passing significant information

³⁶⁹Ibid., H6.

³⁷⁰Ibid. and Banks MS.

³⁷¹Hotchkiss, 15.

³⁷²Worsham, 58.

back to Jackson. The Federal lines and positions across from Stoney Creek apparently remained unconcealed and open to view by the Confederates. The mounted Southern scouts habitually kept their supporting infantrymen on the line well informed about the enemy positions and pointed out the Federal scouts and observation posts to their comrades.³⁷³

In early April, Jackson was faced with an additional challenge to his control in the Valley. A rebellion, centered in McGaheysville, had broken out among pro-Union elements of the Rockingham County militia. In addition to guarding against any Federal advance, Jackson also had to dispatch forces to the area around Swift Run Gap to quell the revolt.³⁷⁴ Not until the 14th would the issue be ended with the capture of the rebel leader.³⁷⁵

While Ashby effectively held the Federals at Stoney Creek, Jackson again moved his force south from their camp at Rude's Hill. On 10 April the Confederates marched to a position north of New Market and established camp there.³⁷⁶ To guard against any possible surprise flanking movement from the Luray Valley to the east, one brigade was posted on the road through Luray Gap on the Massanutten.³⁷⁷ With the

³⁷³Ibid., 59.

³⁷⁴Hotchkiss, 17.

³⁷⁵Ibid., 20.

³⁷⁶Worsham, 59.

³⁷⁷Ibid., 59.

help of Hotchkiss, Jackson was becoming well aware of the opportunities and potential threats offered by the Valley's geography.

Stalled at Stoney Creek since the 1st, Banks was growing increasingly uncertain about the whereabouts of Jackson's main force. On 15 April, Banks reported to Washington, "Ashby still here. We have a sleepless eye on him, and are straining every nerve to advance as quickly as possible."³⁷⁸ The problem with this statement, of course, was that Ashby's location was largely immaterial so long as the main Confederate concentration remained unlocated. In their function as a screening force Ashby's troopers would naturally be visible to the opposing Federals. All that Banks knew were the positions of Jackson's scouts and screen, not the enemy force with whom he should have been concerned.

As the comparative stalemate continued in mid-April, the relative inactivity was contributing to a loss of morale and a decrease in the combat effectiveness of the Confederate cavalry. The 27 companies of Ashby's cavalry were scattered in isolated detachments throughout the Valley to maintain a watch on the enemy. These units, which were already known within Jackson's army for their general lack of military discipline, became less vigilant when separated from the charismatic and aggressive leadership of Ashby. Federal forces received information from a group of pro-Union inhabitants, confirmed by Confederate prisoners, of "...a company of Ashby's cavalry quartered in a Church at Cross Roads, about 8 miles from Columbia Furnace." The isolation of this force offered a tempting target to the Federals who were further

³⁷⁸O.R., Vol. 12, Pt. 1, 78. Dispatch by Banks at 11:00 p.m. 15 April to McClellan.

assisted by "...a young man, a citizen who corroborated the statement made by the prisoners and signified his ability and willingness to lead a party through an unfrequented path...." that could approach the position unseen.³⁷⁹ On 16 April, a body of Federal cavalry crossed Stoney Creek at an unguarded ford and moved against the enemy company at Columbia Furnace. The Federals achieved complete surprise in this sortie and captured the entire enemy company of 60 men.³⁸⁰

Following the successful cavalry raid at Columbia Furnace, Banks resumed his push against Jackson. At 3:00 a.m. on 17 April, the Federals drove Ashby from the Stoney Creek line and continued south. Upon notification of the enemy advance, Jackson dispatched topographer Jedediah Hotchkiss to Mt. Airy to watch the enemy movement and prepared to defend his position near New Market. Ashby, as the rear guard commander, continued boldly to oppose the Federal advance. He attempted to delay the northerners by personally burning the bridge over North River but the enemy was able to save the small span from destruction.

When informed by Hotchkiss that the entire Federal force of 10,000 men was moving against him and that a possible flanking column was approaching his position from west of North River, Jackson decided to retreat south in the hopes of finding a better position.³⁸¹ The Confederates fell back to New Market and then Big

³⁷⁹Boyce MS.

³⁸⁰O.R., Vol. 12, Pt. 1, 426. Report from Banks to Secretary of War Stanton.

³⁸¹Hotchkiss, 24-25.

Spring before stopping for the night. Ashby, meanwhile, held the enemy advance at Sparta.³⁸²

The next day, 18 April, the Confederates continued their retreat. Baggage trains were sent on the Valley Pike to Staunton while the rest of the army moved to Harrisonburg and then turned east towards Keezletown.³⁸³ Ashby continued his attempts to delay the enemy advance. He burned the bridges at Mt. Crawford, Maj. Grattan's, and Bridgewater and then established a holding position northeast of Harrisonburg while the army moved east. The pursuing Federals occupied New Market that day but the tempo of their operation was again slowing down.

On the 19th Jackson marched his forces to McGaheysville and established his own headquarters near Conrad's Store.³⁸⁴ To safeguard his command from any federal force moving up the Luray Valley, Jackson sent Hotchkiss to destroy the Red and Columbia bridges over the South Fork of the Shenandoah. A Federal covering force from New Market, estimated by the Confederates as about 1,000 men³⁸⁵, crossed the Massanutten via Luray Gap and managed to save the Columbia Bridge but advanced no further.³⁸⁶ As the next day was Easter Sunday, both armies rested their troops in camp and prepared for future movements. On the 23d Jackson would move his

³⁸²Ibid., 25.

³⁸³Ibid., 26.

³⁸⁴Ibid.

³⁸⁵O.R., Vol. 12, Pt. 1, 863.

³⁸⁶Hotchkiss, 29.

army up the Blue Ridge into a protective mountain cove which offered relative protection for his forces.³⁸⁷

Hotchkiss was immediately put to work on maps of the Luray Valley, which Jackson viewed as vital to planning his next move. On 21 April, the day that Banks' advance entered Harrisonburg, the Confederate general also dispatched his topographer to find a concealed route through Swift Run Gap to capture the Federals operating near Columbia Bridge. Jackson, however, had actually named the wrong gap. Upon closer questioning Hotchkiss was able to determine that his chief had actually intended Fisher's Gap as the approach route. Using a Mr. Henry H. Propes as guide, Hotchkiss moved via the correct gap, reconnoitered and mapped the enemy camp near Columbia Bridge on the 21st and 22d, and reported his findings to Jackson the following day.³⁸⁸

While Jackson kept his main force relatively concealed within the protective confines of the Luray Valley, the cavalry actively screened his operations and harassed the Federals. On 21 April a small Confederate force captured several prisoners near Winchester.³⁸⁹ On the 24th an enemy patrol near McGaheysville was repulsed after a brief skirmish.³⁹⁰ A Federal cavalry probe was also met by Ashby's cavalry just

³⁸⁷Worsham, 61.

³⁸⁸Hotchkiss, 30.

³⁸⁹Ibid., 32.

³⁹⁰Ibid.

6 miles from Conrad's Store on the 26th.³⁹¹ In an effort to correct some of the deficiencies developing in the cavalry arm, Jackson detached all of the cavalry from Ashby on the 25th and assigned it to the infantry brigades that made up the command. Ashby would still command the advance but would have to apply to the brigade commanders for necessary troops. However, faced with the near resignation of Ashby and the probability of decreased morale and effectiveness by his cavalry, Jackson detailed all of the cavalry back under Ashby's direct command the following day.³⁹²

Towards the end of the month, Banks' assessment of the situation consistently emphasized a decreased Confederate threat. By the 27th, Banks had stopped his advance up the Valley and was increasingly convinced that Jackson's force was effectively beaten. In a 30 April message to the Secretary of War, Banks provided a brief summary of his intelligence threat assessment for the Valley:

...Jackson is bound for Richmond. This is the fact, I have no doubt. Jackson is on half rations, his supplies having been cut off by our advance. There is nothing to be done in this valley this side of fortifications this side of Strasburg.³⁹³

³⁹¹O.R., Vol. 12, Pt. 3, 868.

³⁹²Jackson MS, General Orders 41 and 42. Also a detailed description of events surrounding Ashby's relief and reinstatement to command can be found in Freeman, 338-341.

³⁹³O.R., Vol. 12, Pt. 1, 118. In a second report issued that same day to Stanton, Banks reemphasized his belief that Jackson has left the Valley.

The Confederates, however, had not left the region and were in much better condition than the Federals realized. Although he remained in the protective security offered by the Luray Valley's geography, Jackson was planning for a dramatic offensive that would effect the military situation far outside of his own district. Recognizing the various changes that had occurred in the strategic situation since he had come to the Valley, Jackson would soon attempt to turn the operational opportunities that he saw in his theater of operations into a campaign of strategic value for the south.

D. THE ROLE OF INTELLIGENCE DURING THE FEDERAL ADVANCE

Throughout this phase of operations, Jackson had clearly recognized the role of the intelligence process in the commander's operational planning. As an integral part of his overall responsibility for managing the Confederate military effort in the Valley, Jackson had decisively guided the intelligence effort so that it would have a significant impact on the development of operational plans. By identifying those specific pieces of information that he, as the operational planner and commander, needed, Jackson had narrowed the intelligence collection effort to meet his own operational needs. The general disposition, including size, location, and action, of the enemy was his primary concern and this was reflected in the orders and directions issued to his various scouts and subordinates. Further, the emphasis placed by the Confederate commander on understanding the important elements of geography within his area of responsibility was revealed in his taskings to Hotchkiss and other engineers of the staff. At a time when intelligence and operations functions were

primarily conducted by the commander rather than compartmented staff officers, this understanding of geography was a necessary preparation for the development of effective campaign plans.

In its execution, intelligence collection had also been well handled by the Confederates. The near constant observation of the enemy, which Jackson demanded, helped to limit those inherent gaps caused by less frequent periodicity. By using his cavalry as a means of maintaining contact with the enemy he sought to keep a constant and accurate track of enemy movements.

Jackson's willingness to use various means of collection against the enemy allowed him to fuse the reports from various sources into a more coherent assessment. Although Jackson traditionally relied on his light cavalry forces to track enemy movements, he also incorporated reports from the civilian population, enemy prisoners, engineers, staff officers, subordinates, higher headquarters and the open press into his understanding of the operational situation. Such a wide collection base provided the Confederate commander with, not only the potential for more reporting but, reporting that could be corroborated or disproved when compared with an alternate source.

Associated with this willingness to draw upon all available collection assets was an equally important understanding of the potential weaknesses and limitations of those assets. Civilian sources, always somewhat suspect in their reliability, were even more questionable in the context of a civil war. This was primarily due to the fact that, in addition to the usual concerns over the accuracy of information reported by

civilians, the problems of determining loyalties were more pronounced. While Jackson was willing to accept information from the Valley's inhabitants, he also sought to confirm their reports through other sources and, as a counter intelligence measure of general operational security, restricted their ability to provide information to the enemy. His orders prohibiting the movement of civilians outside his lines and the arrest of known or suspected Federal sympathizers were concrete example of this attempt. Additionally, Jackson's recognition of passivist religious sects within the Valley and his subsequent use of them in military non-combatant roles illustrated his attempts to ensure continued loyalty to the Confederate cause.

Recognition of the developing faults in his cavalry's reporting had resulted in his administrative reorganization of that arm in an attempt to revitalize its usefulness. Because of his heavy dependency on cavalry reports, Jackson had to correct these deficiencies before they worsened. When he realized that his relief of Ashby might be more harmful than beneficial, the Confederate commander had shown flexibility in restoring Ashby to command and simply relying on his subordinate's promise to improve that arm's performance.

Throughout most of the operations to date, Jackson had been able to use his own understanding of military operational art to deduce the actions and intentions of his enemy. The Federal occupation of Winchester, reinforcement following Kernstown, and slow pursuit up the Valley had all been anticipated by the Confederate commander because he was able to balance his own knowledge about tactics, military objectives, and his opponent with the indicators provided by his intelligence assets.

In those areas where Jackson's own knowledge was found lacking he quickly relied on the expertise of others to interpret the importance and meaning of individual facts. This became especially true in his use of engineers to examine the potential opportunities offered by control of key terrain in the Valley.

The major Confederate intelligence failure at Kernstown had been the cumulative product of several contributing factors. What made these mistakes so critical was that they had occurred at the most important phase of the operation - the battle. The loss of enemy contact during the Federal retreat from Strasburg created a gap in knowledge about the enemy size and disposition. In turn, the failure to properly weigh and verify the civilian reports regarding the size of the Federal force at Winchester led Jackson to commit his force against a numerically superior enemy. The poor coordination and timing of the march on the 23rd brought the army into full sight of the enemy lines thereby revealing his force size and tactical deployment. Further, Jackson's general lack of knowledge about the area's geography and his failure to make an immediate forward reconnaissance prevented him from making best use of the available terrain. Finally, as the battle developed, Jackson had shown a certain inflexibility in linking information provided by the tactical realities of the battle with his own operational goal of defeating an inferior enemy.

In comparison, the relative Federal intelligence success at Kernstown had been the only bright spot in their intelligence effort thus far. Because the information provided at Kernstown was of more value to the tactical nature of intelligence during the battle, its effect on the overall operational intelligence picture was minimal.

Banks never assumed an active role in the intelligence process by clearly identifying those things that he needed to know about the enemy and also failed to use his forces aggressively enough to find out the necessary information. Finally, his own analytical abilities were proven faulty in his inability to assess the intentions, combat effectiveness, or even location of the Confederates under Jackson.

THE OPPOSING FORCES AT KERNSTOWN³⁹⁴
(TABLE 3A)

The Union Army
(c. 6750 men)

Shields' Division - Brig. Gen. James Shields
First Brigade - Col. Nathan Kimball
14th Indiana - Lt. Col. William Harrow
8th Ohio - Col. Samuel S. Carroll
67th Ohio - Lt. Col. Alvin C. Voris
84th Pennsylvania - Col. William G. Murray
Second Brigade - Col. Jeremiah C. Sullivan
39th Illinois - Col. Thomas O. Osborn
13th Indiana - Lt. Col. Robert S. Foster
5th Ohio - Lt. Col. John H. Patrick
62nd Ohio - Col. Francis B. Pond
Third Brigade - Col. Erastus B. Tyler
7th Indiana - Lt. Col. John F. Cheek
7th Ohio - Lt. Col. William R. Creighton
29th Ohio - Col. Lewis P. Buckley
110th Pennsylvania - Col. William D. Lewis Jr.
1st West Virginia - Col. Joseph Thoburn
Cavalry - Col. Thornton F. Brodhead
1st Squadron Pennsylvania - Capt. John Keys
Maryland Ind. Company - Capt. Henry A. Cole
Maryland Ind. Company - Capt. William Firey
Maryland Ind. Company - Capt. John Horner
1st West Virginia (Battalion) - Maj. B. F. Chamberlain
1st Ohio (Co's A and C) - Capt. Nathan Menken
1st Michigan (Battalion) - Lt. Col. Joseph T. Copeland
Artillery - Lt. Col. Philip Daum
Batteries A and B, West Virginia - Capt. John Jenks
Battery H, 1st Ohio - Capt. James F. Huntington
Battery L, 1st Ohio - Capt. Lucius N. Robinson
Battery E, 4th U.S. - Capt. Joseph C. Clark Jr.

³⁹⁴Robert Underwood Johnson and Clarence Clough Buel, ed., Battles and Leaders of the Civil War, Vol. 2, The Struggle Intensifies (The Century Company, 1883. reprint, Secaucus, New Jersey: Castle, 1980) 298.

THE OPPOSING FORCES AT KERNSTOWN³⁹⁵
(TABLE 3B)

The Confederate Army
(c. 3377 men)

Valley District - Maj. Gen. Thomas J. Jackson

Garnett's Brigade - Brig. Gen. Richard B. Garnett

2nd Virginia - Col. J.W. Allen

4th Virginia - Lt. Col. Charles A. Ronald

5th Virginia - Col. William H. Harman

27th Virginia - Col. John Echols

33rd Virginia - Col. Arthur C. Cummings

Rockbridge (Virginia) Artillery - Capt. William McLaughlin

West Augusta (Virginia) Artillery - Capt. James H. Waters

Carpenter's (Virginia) Battery - Capt. Joseph Carpenter

Burks's Brigade - Col. Jesse S. Burks

21st Virginia - Lt. Col. John M. Patton

42nd Virginia - Lt. Col. D.A. Langhorne

1st Virginia (Irish) Battalion - Capt. D.B. Bridgford

Pleasant's (Virginia) Battery - Lt. James Pleasants

Fulkerson's Brigade - Col. Samuel V. Fulkerson

23rd Virginia - Lt. Col. Alex G. Taliaferro

37th Virginia - Lt. Col. R.P. Carson

Danville (Virginia) Artillery - Lt. A.C. Lanier

Cavalry - Lt. Col. Turner Ashby

7th Virginia - Lt. Col. Turner Ashby

Chew's (Virginia) Battery - Capt. R.P. Chew

³⁹⁵Ibid., 300.

**CASUALTIES AT KERNSTOWN
(TABLE 4)**

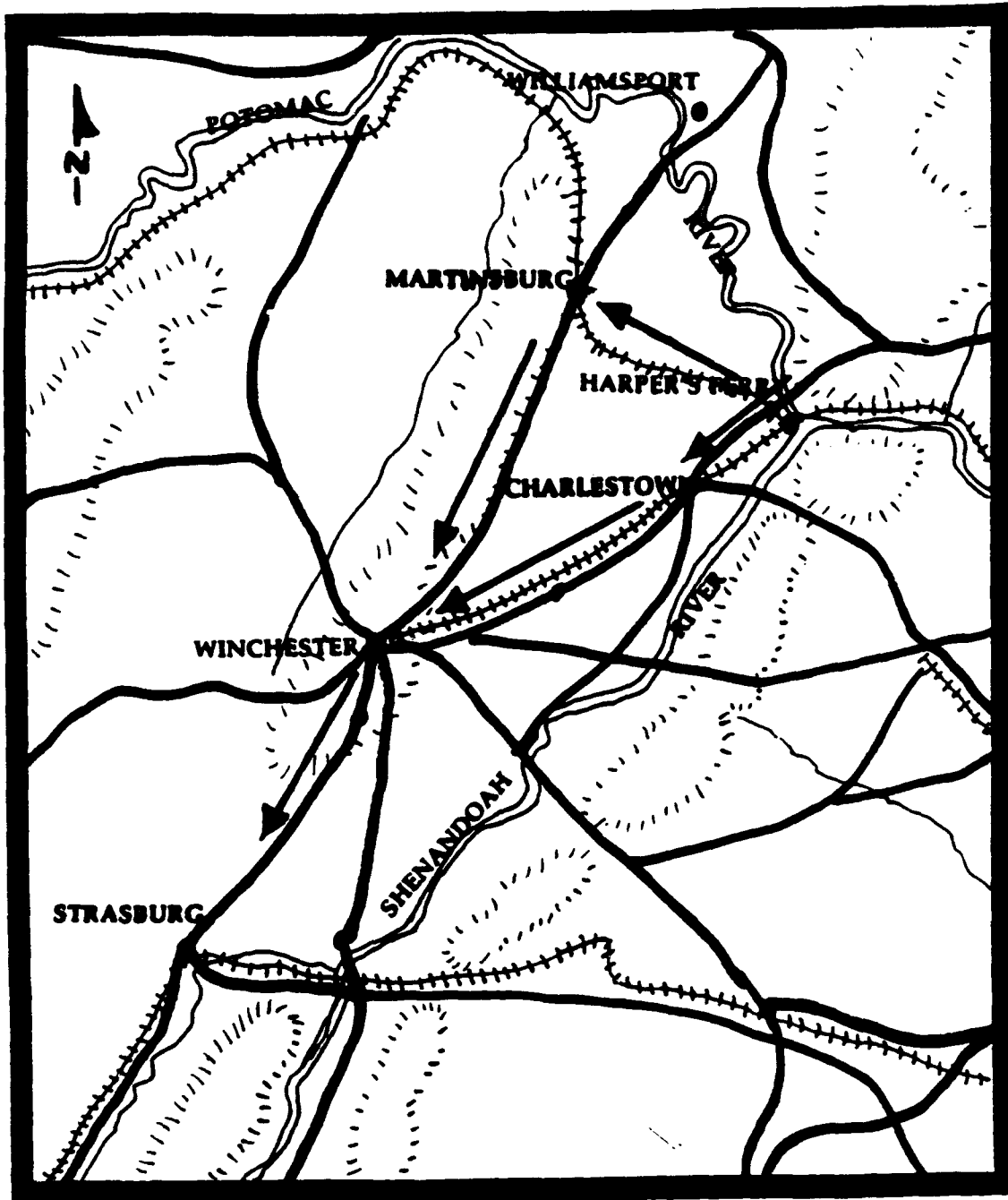
Command	Killed	Union Forces ³⁹⁶ (Shields' Division)			Total
		Wounded or Missing	Captured		
1st Brigade	45	200	1	246	
2nd Brigade	23	69	-	92	
3rd Brigade	43	171	21	235	
Cavalry	3	6	-	9	
Artillery	4	2	-	6	
TOTAL	118	448	22	588	

Command	Killed	Confederate Forces ³⁹⁷ (Jackson's Division)			Total
		Wounded or Missing	Captured		
Garnett's Brigade	40	168	153	361	
Burks' Brigade	24	114	39	177	
Fulkerson's Brigade	15	76	71	162	
Cavalry	1	17	-	18	
TOTAL	80	375	263	718	

³⁹⁶O.R., Vol. 12, Pt. 1, 346-347.

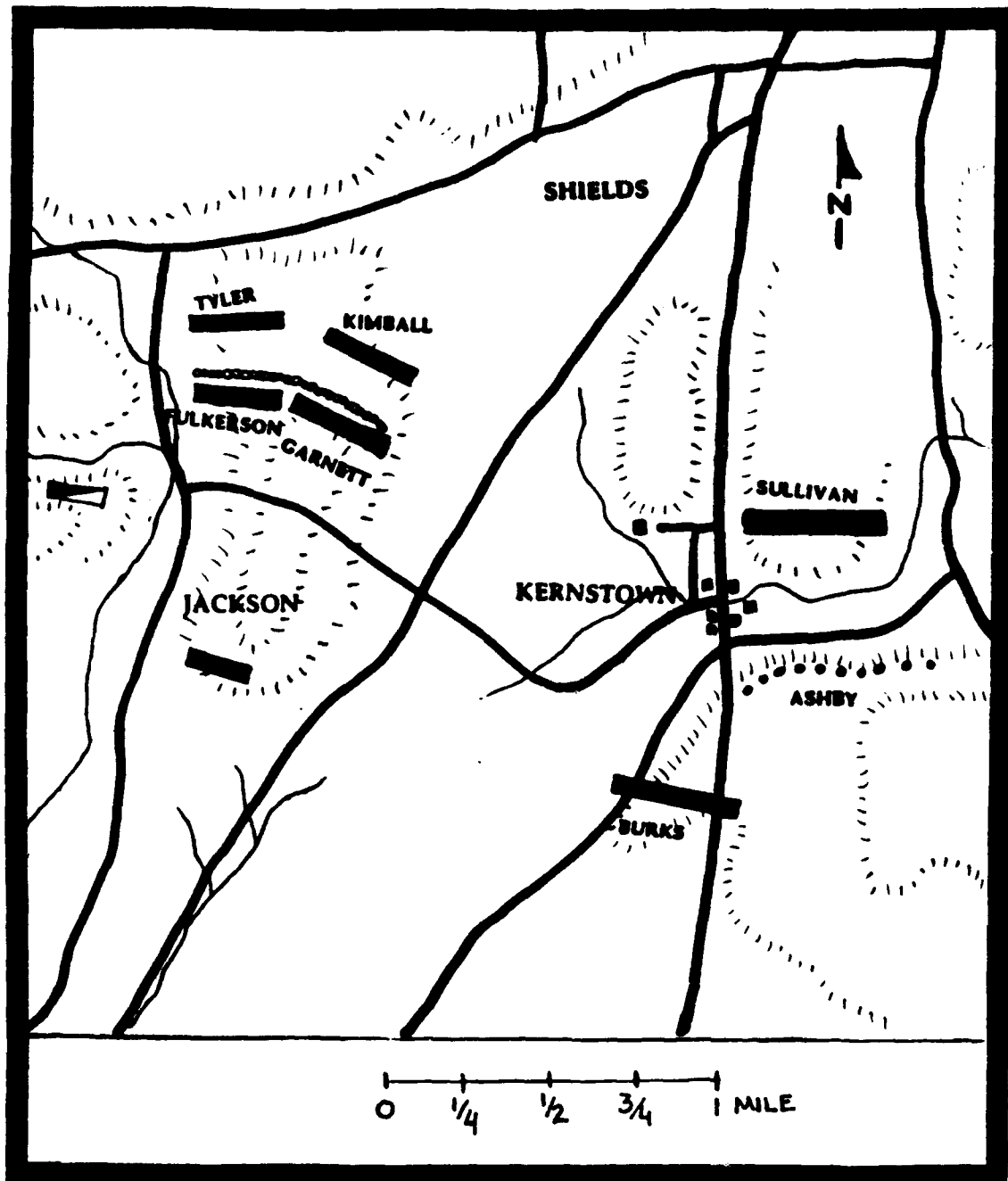
³⁹⁷Ibid., 384.

MAP 4



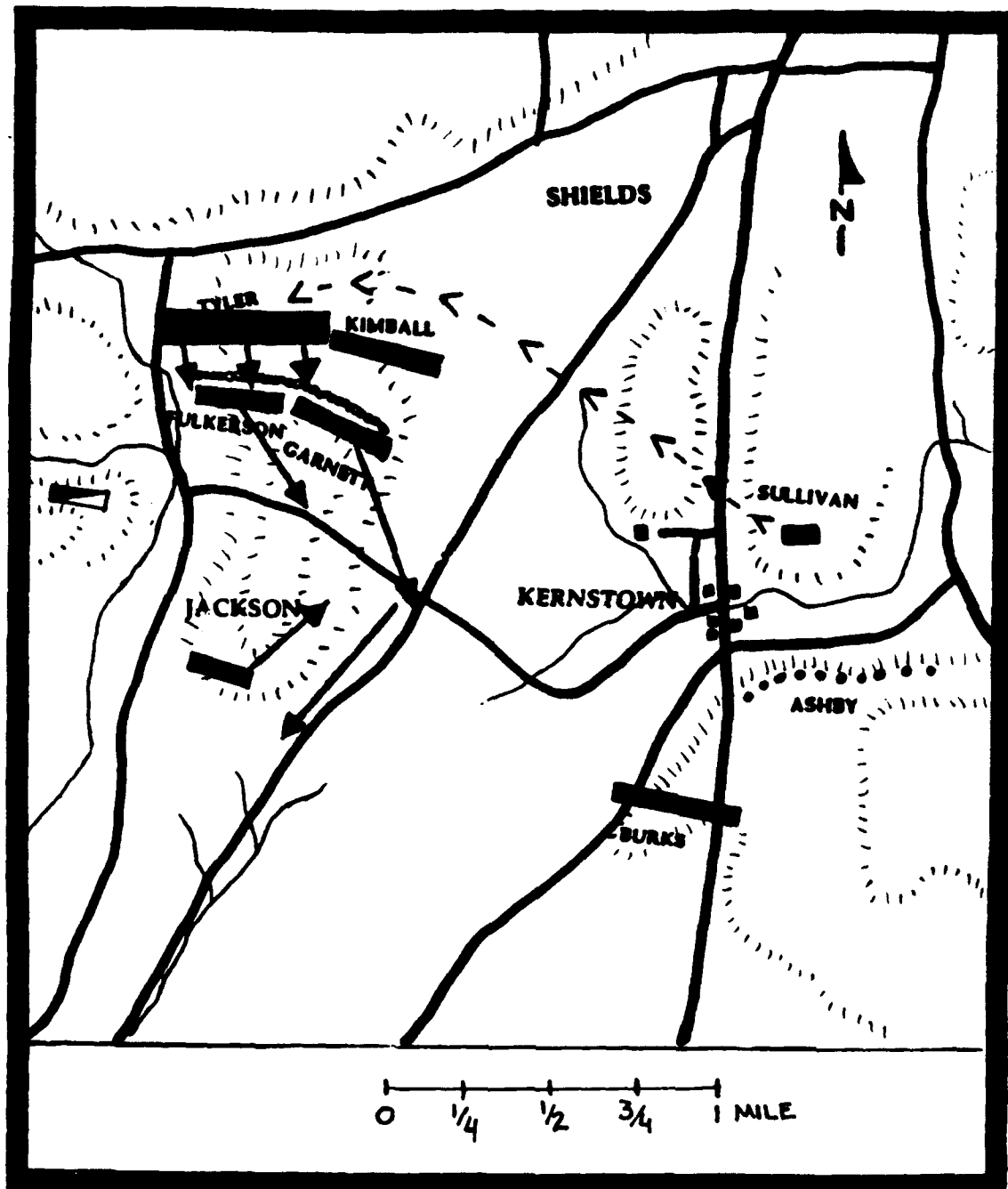
THE FEDERAL ADVANCE TOWARDS STRASBURG

MAP 5



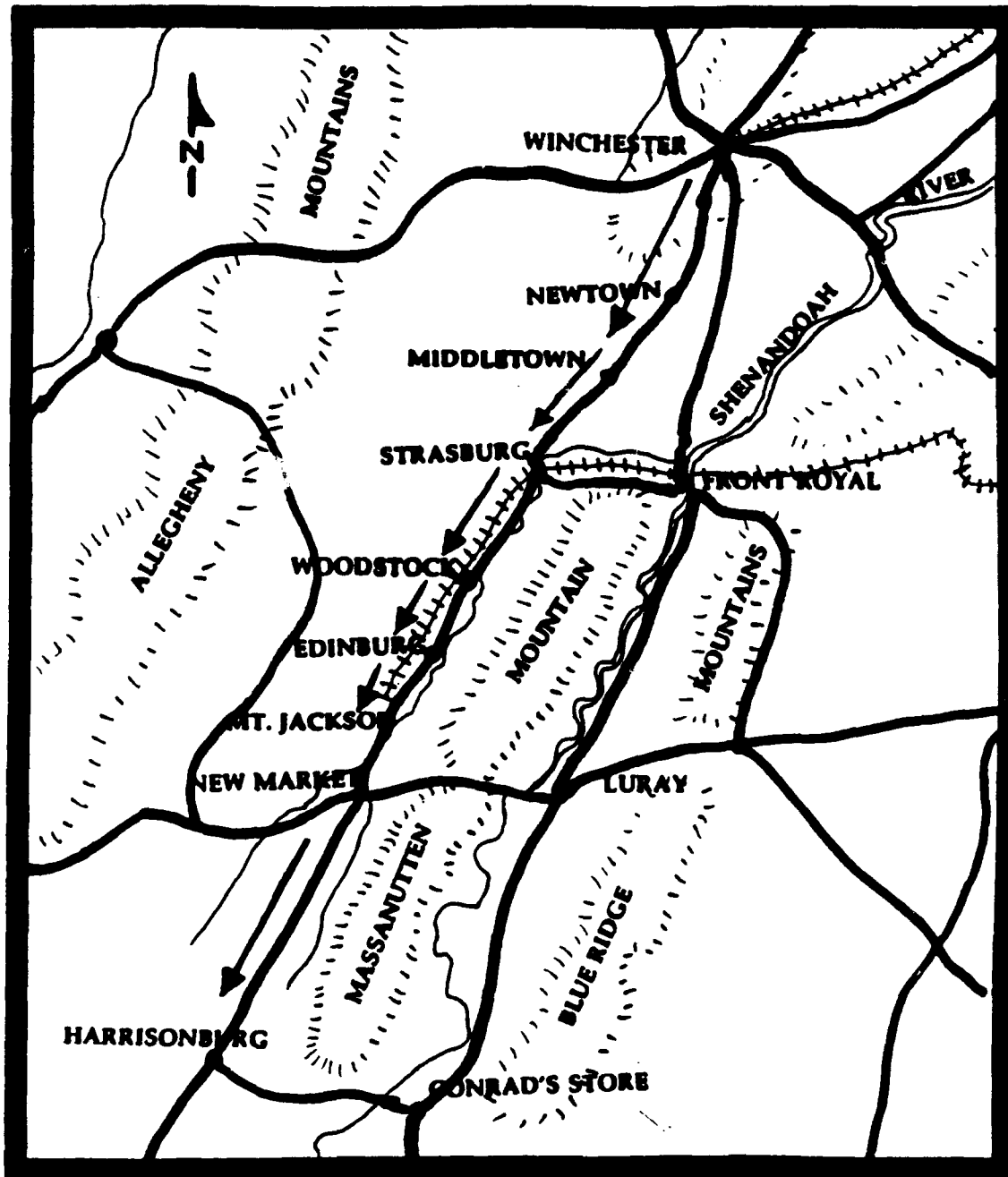
KERNSTOWN: INITIAL FEDERAL AND CONFEDERATE DEPLOYMENTS

MAP 6



KERNSTOWN: FEDERAL REPOSITIONING

MAP 7



THE UNION PURSUIT

IV. JACKSON BEGINS HIS OFFENSIVE

A. THE ROAD TO MCDOWELL

On the morning of 30 April, Jackson began the opening movement of his planned offensive. From his base near Conrad's Store, where the army had been encamped since 19 April, the Confederate commander started south through the Luray Valley (MAP 8). Heavy rains and mountain snow had turned "the ordinary country road", the area's main thoroughfare on which the army now found itself, into a virtual quagmire, however, and progress was painfully slow.³⁹⁸ Many of the troops, and even members of Jackson's personal staff, assisted in the movement of the supply wagons and artillery which often sank to their axles in the deep mud that now characterized the road. During that first day's march, the army advanced a distance of only about 5 miles, to within 2 miles of Lewiston.³⁹⁹ The next day, in an effort to speed the army's movement, trees along the route were felled, split, and placed across the road as planking for a corduroy road.⁴⁰⁰ Even with this engineering effort, the Confederates still only made about 5 miles on 1 May. By the end of the third day, however, after what one of the Confederate infantrymen described as "...one

³⁹⁸Worsham, 61.

³⁹⁹Hotchkiss, 35.

⁴⁰⁰Ibid.

of the most severe marches we had undergone,"⁴⁰¹ the Confederate column reached Port Republic and moved into camp at the entrance to Brown's Gap.

While Jackson's column was moving south, Ewell's division had occupied the Valley Army's vacated camp near Conrad's Store. As he entered this new operating area, Ewell had little information regarding either the enemy or the important geography of the region. As was all too common during Civil War operations, Jackson had apparently provided an inadequate intelligence update to his geographical relief. Although Jedediah Hotchkiss had provided Ewell with a brief summary of enemy sightings made from an observation post at the Masanutten on 30 April,⁴⁰² this information was of a tactical nature and far from the comprehensive assessment that Ewell really needed. In an attempt to become more familiar with the area and the existing enemy situation, Ewell wrote to Jackson and asked what sources the latter had been using to gain intelligence about the enemy. "I have been relying on spies for my information from the enemy", Jackson replied.⁴⁰³

Although reliance on spies alone would hardly fill all of the intelligence gaps that faced Ewell, the relative availability of potential spies in areas close to or under Federal occupation could not be overlooked. Indeed, Confederate spies, acting both in organized networks and simply as opportunities arose, were quite active against the Federals during this period. Through these spies and various local informants,

⁴⁰¹Worsham, 61.

⁴⁰²Hotchkiss, 34. Diary entry for 30 April.

⁴⁰³O.R., Vol. 12, Pt. 3, 878. Jackson to Ewell from headquarters at Brown's Gap, 3 May 1862.

Ewell would become familiar with the area of operations and remain apprised of Federal troop locations and movements. John Anderson, a sergeant of the Union's 2d Massachusetts, related that while his regiment was in camp at Columbia Bridge in the Luray Valley, they were visited by an old man who claimed to be a former resident of Massachusetts. Singing songs with the Northern soldiers and relating various anecdotes about his life in Massachusetts, the visitor spent the night gathering information about the Federal troops. "Passing through the Regiments of our camp and learning the exact strength of our command he was prepared the next morning to give Genl. Stonewall Jackson the information that could only be found out by a spy. We afterwards learned that this was the old man Lawrence of Harper's-ferry that cursed us when our regiment first took possession of that town."⁴⁰⁴

In addition to the number of spies that could be employed to observe the enemy, Ewell would rely on Confederate cavalry to track the movements of the Federal forces. Jackson had left the capable Col. Turner Ashby to watch Banks and to act as a screen for Jackson's own movements. Two Confederate cavalry regiments, Col. Thomas Munford's 2d Virginia and Col. Thomas Flourney's 6th Virginia, had also accompanied Ewell across the Blue Ridge and would now be used to augment other intelligence collection assets in the region.

On 3 May, in a surprising move to many of the Confederate soldiers, Jackson left Ewell's division at Conrad's Store and marched the Army of the Valley east, through Brown's Gap. As Jackson's troops "...marched across the Blue Ridge to the Central

⁴⁰⁴Anderson MS.

Railroad near Meechum's Depot,"⁴⁰⁵ many of the soldiers assumed that they were leaving the Valley for good. A movement to reinforce Johnston's besieged army at Richmond had long been rumored and, with the relief by Ewell's division and the crossing of the Blue Ridge, this now seemed like the logical objective of the present operation.

This eastward march, however, was actually part of a major deception by Jackson. Although the Confederate commander had made great use of local inhabitants as spies and informants, Jackson also realized that not all of the Valley's civilian population were friendly to the Southern cause. Some Unionist elements were continually passing information to the Federals despite the restrictive measures Jackson had placed on the movements and daily activities of civilians in the region. Additionally, despite Ashby's extensive cavalry screen, some Northern scouts might still be able to breach Confederate security measures for reconnaissance against the Army of the Valley. Although Jackson, as an extreme disciple of operational security, had maintained strict silence about his true intentions, he now used the open movement of his force as a means of deceiving the enemy. Jackson believed that news of his departure from the Valley would surely reach Banks and the Union commander would logically presume that the Confederates had moved towards Richmond for the contest against Gen. McClellan's Federal Army of the Potomac.

On the morning of the 4th, the Southern troops began boarding the trains which had been waiting at the depot. However, to the amazement of most of the

⁴⁰⁵Worsham, 63.

Confederates, the trains moved west across the Blue Ridge and back towards the Shenandoah Valley. Staunton, not Richmond, was the destination of the Confederate force. Only now did Jackson's army, including most of his staff, realize that the previous day's march had been a ruse to mislead the enemy. When the Southern advance reached Staunton at around 11:00 a.m., the town's inhabitants were elatedly shocked.⁴⁰⁶ Word had already reached them of the Confederate evacuation of the Valley the previous day and, in keeping with Jackson's deceptive intentions, the civilians had surmised that the town was being abandoned to sure occupation by the Federals. If the Union military commanders could be deceived as easily, Jackson would increase his chance of surprising the enemy. As the first load of Confederates debarked at the station in Staunton, the trains were rapidly turned around to pick up the rest of the army, which had begun the westward movement on foot. Winder's Stonewall Brigade boarded the cars at Afton and finally arrived in Staunton by about 5:00 p.m. that afternoon.⁴⁰⁷ While his brigades were being shuttled to the town, Jackson established his headquarters in the Virginia Hotel and began conferring with Brig. Gen. Edward Johnson, commander of the Army of the Northwest.⁴⁰⁸ Johnson reported that the Federal forces opposing him were continuing an eastward advance and were now only about 16 miles west of Johnson's own force in Westview. This

⁴⁰⁶Hotchkiss, 36.

⁴⁰⁷Ibid.

⁴⁰⁸Ibid.

information was in turn passed to Gen. Ewell with the guidance to "...prevent Banks giving assistance to the forces in front of Johnson."⁴⁰⁹

Gen. Banks, whose Federal force was still in Harrisonburg, had been receiving various information regarding the probable intentions of the Confederate enemy. On 1 May, Gen. Williams, the commander of Banks' 1st Division, stated that citizens of Harrisonburg had reported that Southern forces under Johnson were planning to attack the Federal right flank while Jackson assailed their front. Although Williams admitted that he placed little confidence in the accuracy of these reports, he felt that some enemy action was afoot.⁴¹⁰ At Columbia Bridge in the Luray Valley, Col. Sullivan, the local Union commander, informed Banks that refugees believed Jackson had no intention of attacking the Federals at all unless Banks attempted to divide his command or move east to reinforce Gen. McDowell.⁴¹¹

Despite these conflicting assessments by his subordinates, Banks had been able to successfully track some of Jackson's initial movements. From his headquarters at New Market, Banks wrote to both the War Department in Washington and to Gen. Fremont in the neighboring Mountain Department on 2 May that Jackson had moved south from Conrad's Store and had probably reached Port Republic on the 1st. "His destination either Waynesboro or Staunton. If latter place, possibly to join Johnson

⁴⁰⁹O.R., Vol. 12, Pt. 3, 879. Jackson to Ewell from White Hall 4 May.

⁴¹⁰Banks MS. Letter of 1 May from 1st Division Headquarters in Harrisonburg to Banks.

⁴¹¹Ibid. 1 May message from Col. Sullivan to Banks.

and attack Milroy.⁴¹² However, after Jackson's crossing of the Blue Ridge on the 3d, Banks remained generally confused as to the Confederates' whereabouts and intentions. On the 4th, Banks was still "...confident that Jackson's force is near Port Republic, and Ewell's division at Elk Run Church...."⁴¹³ By 6 May, Banks now surmised that "Ewell's division seems intended to replace Jackson's force, which is greatly demoralized and broken."⁴¹⁴

Ashby's cavalry was acting as an effective screen to Jackson's movements and contributed to Federal confusion over Jackson's intentions. While the location of Jackson's main body thus eluded Federal detection, the presence of Confederate cavalry and scouts plagued the Union commanders. From Harrisonburg, Lt. Galwey of the 8th Ohio noted the near constant Confederate cavalry presence and wrote that "Alarms are sounded every night. Jackson is moving somewhere all the time he is as lively as a flea."⁴¹⁵ In the wake of a skirmish between the 5th New York Cavalry and Ashby's mounted Confederates on 7 May, Banks wrote that "The enemy does not show himself except by cavalry. We shall make most vigorous efforts to discover his position. His chief object will doubtless be to prevent a junction of forces on this

⁴¹²O.R., Vol. 12, Pt. 3, 126. Information to this effect had been reported to Banks in letters of 1 May from Col. Sullivan at Columbia Bridge and from cavalry headquarters at Harrisonburg on the 2d. these original letters are found in Banks MS.

⁴¹³Ibid, 132.

⁴¹⁴Ibid, 136 -137. 6 May message from Banks to Stanton.

⁴¹⁵Thomas Francis Galwey, Manuscript. *Memoir, 1861-1864*. Manuscript Division, Library of Congress, Washington, D.C.

line with General McDowell."⁴¹⁶ From the Federal outpost at Columbia Bridge, Col. Sullivan complained that Jackson's scouts were "...becoming bolder and ever venturesome..."⁴¹⁷ while Col. Geary, the Federal commander at Rectortown, noted the absence of any identifiable enemy units in the area but added that "Guerillas however still hover about the neighborhood."⁴¹⁸

Gen. Fremont passed Banks' warning of 2 May to Brig. Gen. Milroy, whose Federal brigade was in the vicinity of Monterey. Advising Milroy to remain vigilant, Fremont told his subordinate to "...keep your scouts and reconnoitering parties actively engaged."⁴¹⁹ Milroy, however, remained generally confident about his prospects for continuing on the offensive. His brigade had been able to slowly but consistently push the Confederates of Edward Johnson's Army of the Northwest back towards Staunton and Milroy saw the capture of this town as increasingly attainable. During the last week of April, the Federal brigade commander had sent a single cavalry company and six infantry companies on a reconnaissance towards Westview and believed that this small force had almost been able to cause Johnson to retreat towards Staunton. On 1 May, Milroy confidently wrote that "Information received from scouts, deserters, and refugees is that Johnson's force is at Westview, 6 miles west of Staunton, ready to retreat upon any advance by us and rapidly gathering all

⁴¹⁶O.R., Vol. 12, Pt. 1, 456.

⁴¹⁷Banks MS. 1 May message from Col. Sullivan, commanding at Columbia Bridge, to Banks.

⁴¹⁸Ibid. 1 May message from Geary to Banks.

⁴¹⁹O.R., Vol. 12, Pt. 3, 133.

the militia, subsistence, forage, and transportation he can and sending it east."⁴²⁰ Had Milroy known of Jackson's arrival in Staunton on the 4th, he might have changed his optimistic assessment.

The day after his meeting with Johnson, Jackson began active intelligence collection operations in the area to determine the true nature of the enemy situation. On 5 May, Jedediah Hotchkiss was sent to Johnson's headquarters for an initial briefing and then, because of the topographer's general familiarity with the region, was dispatched on a reconnaissance to discern the enemy's location and disposition. Hotchkiss travelled to Dry Branch Gap in Big North Mountain and then moved northeast along Crawford Mountain. From the later position, he was able to view a Union outpost located near Cross' and, after making appropriate notes on the situation, reported this information back to Johnson's headquarters.⁴²¹ On the 6th, Hotchkiss and Col. Williamson of the engineer corps, again went to observe the enemy camp at Cross' but found that the Federals had departed. The information from this two day reconnaissance was related to Jackson upon the engineers' return to Staunton later that day.⁴²²

In addition to the news from Hotchkiss and Williams, Jackson was apparently receiving other reports concerning the status of the various Federal forces throughout the district. Because of the relative proximity of Banks' and Fremont's forces to one

⁴²⁰Ibid, 123. Milroy's official report of events before the Battle of McDowell.

⁴²¹Hotchkiss, 37. Diary entry for 5 May.

⁴²²Ibid. Diary entry for 6 May.

another and to Jackson, the Confederate commander had to remain intimately aware of the status of all enemy forces in the region. On 5 May Jackson wrote to Ewell, whose troops were still in the Luray Valley, that Banks' Federal troops had left Harrisonburg and might be on their way towards the town of Warm Springs for a possible rendezvous with Milroy's Federal brigade. Capt. Winfield of the Southern cavalry was dispatched to determine the enemy's movements with instructions to inform both Jackson and Ewell of the results.⁴²³ The following day, Jackson sent another message to Ewell in which he confirmed the Federal evacuation of Harrisonburg but now related that, according to a civilian source that had been in the town, this enemy force was withdrawing towards Strasburg. The Confederate chief advised Ewell to watch Banks' division closely and to keep him informed of its movements.⁴²⁴ In a letter to Ewell on the 7th, Jackson also asked the junior general if the enemy had left the area around Columbia Bridge and urged Ewell to determine, by closely following Banks down the Valley, whether the Federals planned to cross the Blue Ridge for the east. To aid Ewell in discerning Union intentions, Jackson introduced Ewell to "...a spy named McVicar, whom you can send to Front Royal to ascertain whether the enemy leave the Valley."⁴²⁵ As a further reminder, Jackson

⁴²³O.R., Vol. 12, Pt. 3, 881. Jackson to Ewell from headquarters in Staunton, 9:20 p.m. 5 May.

⁴²⁴Ibid.

⁴²⁵Ibid, 882.

enjoined Ewell not to "...leave the Valley so long as Banks is in it, and I am on the expedition of which I spoke to you."⁴²⁶

While both belligerents employed various means to dispel the inherent fog of war and to determine enemy intentions, Jackson continued overt preparations for his advance against the Federals. On the 5th, the Corps of Cadets from the Virginia Military Institute joined the rest of Jackson's army in Staunton. Although Jackson planned to use the cadets only as part of his reserve, their inclusion in active field operations underscored the importance that the Southern commander placed on the upcoming contest and on his attempts to concentrate a superior force against the enemy.⁴²⁷ While in Staunton, many of the soldiers were also issued supplies and reequipped for the upcoming advance. Even Jackson himself received a new uniform to replace the faded VMI professor's garb that he had habitually worn in the field.⁴²⁸

The Army of the Valley marched west from Staunton on the 6th and linked up with Johnson's Army of the Northwest about noon that day at Westview.⁴²⁹ The combined Confederate force now numbered about 9,000 men. While Johnson maintained an advance to the west, the majority of the troops were placed into camp near Buffalo Gap for the night.

⁴²⁶Jackson MS, Letters, 223. Also O.R., Vol.12, Pt. 3, 882.

⁴²⁷Ibid, 222.

⁴²⁸Hotchkiss, 37. Diary entry for 5 May.

⁴²⁹Worsham, 63.

"On the morning of 7 May General Johnson, whose familiarity with that mountain region and whose high qualities as a soldier admirably fitted him for the advance, moved with his command in the direction of the enemy...."⁴³⁰ The Southern forces encountered several small Federal outposts near the intersection of the Harrisonburg and Parkersburg turnpikes, but these were easily driven off.⁴³¹ The Federals at each of these outposts had fled so quickly that they abandoned baggage and equipment which Jackson felt would have been "...about enough for a regiment."⁴³² In the wake of these skirmishes, the Confederates could see the Federals retreating towards the crest of "...Shenandoah Mountain where Fort Johnson had been erected and occupied by the Confederates during the preceding winter."⁴³³ Suspecting that the Union troops might use this position as a likely point of defense, Jackson quickly dispatched two of his trusted staff members to perform a hasty reconnaissance of the mountain's crest. Jedediah Hotchkiss was sent up a spur on the right while Col. Williamson led a small group of scouts along the left flank. After reaching the crest, both reconnaissance parties converged on the former Confederate earthworks and the gap through which the turnpike passed over the mountain. The Union troops were gone, however, and the Confederate advance continued after Hotchkiss had signalled back

⁴³⁰O.R., Vol. 12, Pt. 1, 471. Jackson official report of actions before McDowell.

⁴³¹R.L. Dabney, Life and Campaigns of Lieut.-Gen. Thomas J. Jackson (Stonewall Jackson) (reprint, Harrisonburg, Virginia: Sprinkle Publications, 1983) 341.

⁴³²O.R., Vol. 12, Pt. 3, 884. Jackson to Ewell, 5:10 a.m. 8 May.

⁴³³Jedediah Hotchkiss, Manuscript. Papers, 1838-1908. Manuscript Division, Library of Congress, Washington, D.C.

to Jackson that the route was clear.⁴³⁴ As the Confederates crossed Shenandoah Mountain, soldiers in the Southern ranks "...could see a long line of the enemy in position on the opposite mountain,"⁴³⁵ Shaw's Ridge.

The local Federal commander, Brig. Gen. Milroy, had not been idle during the Southern advance. Earlier on the 6th, the Union brigadier had sent large detachments from the 3d West Virginia, 32d Ohio and 75th Ohio to Shaw's Ridge to protect the reconnaissance and forage parties operating in that area.⁴³⁶ On the morning of the 7th, Federal scouts confirmed rumors that Jackson had, in fact, joined forces with Johnson and that the combined Confederate army was advancing towards McDowell. Accordingly, Milroy issued orders for all Federal units to concentrate at McDowell and began making preparations to defend that place. As Southern troops crossed Shenandoah Mountain in pursuit of Union pickets on the afternoon of the 7th, Federal observers on Shaw's Ridge reported the enemy's location to Milroy who then sent a section of Capt. Henry Hyman's 9th Ohio Battery to shell the Confederates.

Despite some light resistance by Federal artillery, the Confederate advance up Shaw's Ridge was reminiscent of the movement against Shenandoah Mountain. Hotchkiss and Williamson again "...rendered valuable service"⁴³⁷ by leading reconnaissance scouts against the enemy flanks. Faced with this two-pronged probe,

⁴³⁴Hotchkiss, 38.

⁴³⁵Worsham, 64.

⁴³⁶O.R., Vol. 12, Pt. 1, 465. Milroy's official report of actions before McDowell.

⁴³⁷Ibid, 473. Jackson's official report.

the Federals again withdrew before the Southerners reached the summit. After Hotchkiss had signalled that the position was clear, Johnson's advance force moved to Shaw's Fork while the rest of the Confederate troops went into camp for the night at the eastern base of Shaw's Ridge.⁴³⁸

Early on the morning of 8 May, the Confederates resumed their advance. The main Southern column moved unopposed up Shaw's Ridge⁴³⁹ in the same marching order as the day before. The Army of the Northwest, with the 2d Brigade in advance and the 1st Brigade immediately behind⁴⁴⁰, led the line of march followed by Jackson's 2d Brigade, 3d Brigade, the VMI cadet corps, and the Stonewall Brigade.⁴⁴¹ To ensure proper warning of any potential contact with the retreating Federals, Hotchkiss was sent forward on a route reconnaissance of the turnpike. During the winding climb up Bull Pasture Mountain, the topographer "...signaled back from each turn in the road and the head of the army advanced more rapidly than up the direct courses of the road in crossing the other ridges."⁴⁴²

Upon reaching the top of Bull Pasture Mountain, the main body of the Confederate force was halted.⁴⁴³ Because of his general familiarity with the region and some

⁴³⁸Hotchkiss, 39. Diary entry of 7 May.

⁴³⁹Ibid. Diary entry of 8 May.

⁴⁴⁰O.R., Vol. 12, Pt. 1, 486.

⁴⁴¹Worsham, 64.

⁴⁴²Hotchkiss MS.

⁴⁴³O.R., Vol. 12, Pt. 1, 471. Jackson's report.

topographic work performed near McDowell in 1861, Hotchkiss was summoned by Jackson to provide information about the area's terrain.⁴⁴⁴ The topographer led his commander to a vantage point which offered a good view of the area and briefed Jackson on some of the more important aspects of the military geography. This information was then supplemented with a detailed sketch map which the staff officer produced on the spot. Armed with this initial information, Generals Jackson and Johnson, along with selected members of their staffs and about 30 infantrymen to act as security, then continued onward about another 2 miles to perform a commanders' reconnaissance of the enemy position at McDowell.⁴⁴⁵ From the heights of Sitlington's Hill, an independent western spur off of Bull Pasture Mountain, the Confederates had a clear view of the Federal positions. Two Union infantry regiments were noted in line of battle on Phoenix Hull's Hill, across the turnpike from the Confederate observers,⁴⁴⁶ and a "considerable force of infantry" was seen in the small valley around the town itself.⁴⁴⁷ Additionally, an enemy artillery battery, with supporting infantry, was observed on a ridge about 1 mile to the front. A small group of Federal skirmishers soon noted the Confederate leaders and their staffs, however, and fired upon the Southern party.⁴⁴⁸ The Federals,

⁴⁴⁴Hotchkiss MS. Detailed post-war account of his participation in the McDowell operation written for Col. Henderson's book on Jackson.

⁴⁴⁵O.R., Vol. 12, Pt. 1, 483. Gen. Edward Johnson's official battle report.

⁴⁴⁶Hotchkiss, 40.

⁴⁴⁷O.R., Vol. 12, Pt. 1, 471. Jackson.

⁴⁴⁸Hotchkiss, 39.

though, were easily driven off by the Confederate infantrymen who had accompanied the Southern generals.

Following this reconnaissance of the Union position, the Confederate commander decided to wait until the following morning to initiate an attack on Milroy's force. Jackson had recognized that the Federal positions commanded the road along which Southern artillery would have to be moved for any immediate attack on McDowell.⁴⁴⁹ Therefore, Jackson had decided to occupy and hold the favorable position on Sitlington's Hill, construct a passable route for the movement of artillery up the hill, and open his attack at dawn on the 9th.⁴⁵⁰ Although some light skirmishing with the Federals might be expected throughout the 8th, a general engagement would be reserved for the following day. In preparation for the next day's battle, Johnson's brigades were ordered forward to occupy Sitlington's Hill.⁴⁵¹ Additionally, Jedediah Hotchkiss was tasked with finding a suitable route for the movement of artillery from the turnpike to the crest of the hill.⁴⁵² The remainder of the Confederate units were to be placed in camp for the night along the turnpike and moved forward before dawn. Although Jackson himself remained at the base of

⁴⁴⁹O.R., Vol. 12, Pt. 1, 473. Jackson.

⁴⁵⁰Ibid, 485. After-action report of Col. Scott, commander of Johnson's 2d Brigade.

⁴⁵¹Ibid, 471. Jackson.

⁴⁵²Hotchkiss, 40.

the hill to confer with Gen. Johnson, his staff then retired to Wilson's, about 2 miles from Sitlington's Hill, where headquarters was established.⁴⁵³

During the Confederate movement towards McDowell, Jackson had clearly demonstrated competent use and management of his intelligence effort. As the chief operational commander and planner, Jackson had focused his intelligence collection only on those things that were important to the successful completion of the operation. The location and disposition of Milroy's force had been the primary concern for Jackson and he had consistently used scouts and staff officers in a reconnaissance role to discern this information. Jackson had also remained well aware of the potential threat offered by Banks' presence in Harrisonburg. If Banks was "...bold enough he could readily move forward to Staunton, as he was nearer to that point than Jackson himself...."⁴⁵⁴ Accordingly, the Confederate commander had maintained good communications to subordinates such as Gen. Ewell, who had been placed on Banks' flank to threaten and watch the Federals from the east, and Col. Ashby, whose heavy cavalry screen between Harrisonburg and Staunton would prevent the Federals from knowing the true whereabouts of Jackson's command and would provide ample warning of any Federal advance to the south.

Jackson's recognition of the potential impact of intelligence on an operational commander's planning had led him to undertake the major deception effort offered

⁴⁵³Hotchkiss MS.

⁴⁵⁴Ibid. Postwar transcript (1 April 1882) of statement by Capt. H.M. Bell, Confederate Post Quartermaster at Staunton.

by the eastward march across the Blue Ridge. The difficulty of the march, the apparent logic of an eastward move, and the subsequent geographic screening offered by the Blue Ridge all helped to reinforce the misleading picture that Jackson created for Federal consumption. While the inherent uncertainty of war always served to mystify an opponent, well-conceived and executed deception could lead an enemy commander to a firmly held, but incorrect, conclusion.

To fulfill the various intelligence requirements that developed during the movement towards McDowell, the Confederate commander had maintained centralized control over the various intelligence assets that were available. Although Johnson, Ewell, and Ashby all had their own intelligence collection capabilities and priorities, Jackson had consistently issued guidance that kept these assets focused towards the same operational goal. Rather than allowing a diffusion of collection and analysis, Jackson had been the driving force in the direction of the intelligence effort towards a unified and coherent picture of the operational enemy situation through the fusion of all available reporting, and had then disseminated this assessment to his subordinates.

Conversely, Union intelligence had lacked the centralized focus and control that had characterized the Confederate effort. Because the forces under Banks and Fremont were operating independently, under different operational assumptions, and with potentially different operational objectives, the intelligence effort of the Union forces had also remained decentralized and uncoordinated. Additionally, the lack of clearly and energetically stated operational objectives and intelligence collection goals

by the Federal commanders had led to lackluster analysis and incorrect conclusions regarding Confederate whereabouts and intentions. Although some warning had been provided to Fremont of a possible westward movement by Jackson, the Federal commander of the Mountain Department had failed to focus any intelligence efforts towards determining the validity of this assessment. Milroy, the local Union commander, had capably responded to tactical reports of the enemy's presence in his front by increasing his own reconnaissance efforts but his ability to resist the Confederate advance had been minimal owing to the scattered nature of his force.

B. THE BATTLE OF MCDOWELL

The eighth of May would see far more action than the simple skirmishing predicted by Jackson. As the Army of the Northwest's 2d Brigade, under Col. Scott, arrived at Sitlington's Hill, Johnson quickly assigned his regiments into position. "On the top of that hill there was a crest or ridge, running from north to south, except about midway, where the ground was not above the ordinary level of the hill."⁴⁵⁵ The 52d Virginia, the first regiment to arrive on the scene, was placed on the extreme left and deployed as skirmishers.⁴⁵⁶ The 58th Virginia was placed on the right while the 44th Virginia was ordered to hold the center.⁴⁵⁷ Almost as soon as they arrived

⁴⁵⁵O.R., Vol. 12, Pt. 1, 485. Col. Scott's report.

⁴⁵⁶Ibid, 483. Report of Gen. Johnson. Also 471 Jackson. Because Jackson remained absent from the field during the battle, the senior Confederate commander was forced to base those portions of his report which were concerned with the combat of 8 May largely upon the input of subordinates. While Jackson's and Johnson's reports parallel one another, only one reference will be given for specific details.

⁴⁵⁷Ibid, 485. Scott.

on the scene, the Confederate troops received fire from enemy skirmishers and artillery. In order to protect his men against the Federal artillery fire and to take full advantage of the available terrain, Col. Scott deployed the soldiers of his brigade in pairs of skirmishers with about 5 yards between each pair of men (MAP 9).⁴⁵⁸

Milroy, the Federal commander at McDowell, had become aware of the growing Confederate presence on Sitlington's Hill as soon as the initial Southern reconnaissance party had been sighted by his skirmishers.⁴⁵⁹ To harass the Confederate position, Milroy had ordered a section of the 9th Ohio Battery to begin shelling the hill and dispatched a small group of skirmishers to assail the enemy's left and determine the size of the Confederate force. Although the Union guns would continue to shell the Southern position throughout most of the day, the high angle of fire and the shelter provided by the hill's geography prevented any serious effect.⁴⁶⁰

The 12th Georgia, as the first regiment of Johnson's 1st Brigade to arrive on the scene, was now placed in the center of the Confederate line, on the crest of the hill, directly facing the main Federal position. The 58th Virginia was moved to the left, supporting the skirmishers of the 52d Virginia, and the 44th Virginia was moved to the edge of a slight ravine, as the anchor of the Confederate right.⁴⁶¹

⁴⁵⁸Ibid.

⁴⁵⁹Ibid, 465. Milroy's official battle report.

⁴⁶⁰Ibid, 472. Jackson.

⁴⁶¹Ibid, 483. Johnson.

At around 10:00 a.m., Federal reinforcements arrived at McDowell.⁴⁶² After receiving word on the 7th that Milroy was being pressed by the combined Confederate force, Brig. Gen. Schenck had left his cumbersome supply wagons with a small guard force and had marched his brigade 34 miles in 23 hours to reach McDowell.⁴⁶³ With only about 1550 men in his brigade, Schenck realized that he brought relatively little additional strength to the Federal position (TABLE 5A). Upon his arrival, Schenck found Milroy's "...regiments of infantry partly in line of battle in the plain at McDowell, covering some of the various approaches from the mountain, and partly disposed as skirmishers on the heights in front, and his batteries in position, expecting momentarily that the enemy would attempt to descend into the valley to attack him under cover of artillery that might be brought forward to command the place from different points."⁴⁶⁴ The newly arrived Union general's initial observations were enough to convince him that McDowell was "...indefensible altogether, by the unanimous agreement of officers, in our present conditions and with our relative forces."⁴⁶⁵ Although Schenck, using the available intelligence about the enemy and the surrounding geography, had decided on a withdrawal as the best course of action, he also thought that some type of preemptive attack might help to break contact with the enemy and delay any Confederate pursuit. As the senior

⁴⁶²Ibid, 465. Milroy.

⁴⁶³Ibid, 462. Schenck's official battle report.

⁴⁶⁴Ibid, 463.

⁴⁶⁵Ibid, 461. Message from Schenck to Fremont at 11:30 p.m. 8 May.

Union Brig. Gen. on the scene, Schenck now had overall responsibility for future Federal actions. Owing to Milroy's greater familiarity with the area, however, and the previous disposition of Federal forces, Schenck decided to allow Milroy to retain command of any forces that might be actively engaged on the field while Schenck himself would exercise control over the general course of Federal actions.

Throughout the rest of the morning, the Federals continued light shelling and skirmishing against the Confederates on Sitlington's Hill. Maj. Long, of the 75th Ohio, was dispatched with a group of skirmishers to probe the Confederate position and determine the location and strength of the enemy line.⁴⁶⁶ Information provided by Long would allow the Union generals to make a better decision as to when and where any attack might be launched. Although the Federal skirmishers acted to harass the Southerners, Johnson's ability to hold the hill was never in question throughout the morning.

At around 2:00 p.m., the Federals increased their pressure against the Confederates. Col. Nathaniel C. MacLean formed seven companies of the 75th Ohio and nine companies of the 25th Ohio at the base of the hill and began to advance against the Confederate right.⁴⁶⁷ With the men of the 25th Ohio deployed forward as skirmishers and the 75th Ohio following in line of battle, the Union soldiers advanced over ground that was "...entirely destitute of protection either from trees or rocks, and so steep that the men were at times compelled to march either to one side or the other

⁴⁶⁶Ibid, 465. Milroy.

⁴⁶⁷Ibid, 468. MacLean's post-battle report.

in order to make the ascent.⁴⁶⁸ The terrain of the hill, with its steep convex slope and generally circular shape, often concealed the opposing lines until they were relatively close to one another.⁴⁶⁹ Although the fire from the Confederate line initially stalled the Federal advance, the two Ohio regiments continued to deliver a heavy fire against the Southerners and forced them back from the military crest of the hill. MacLean's men moved forward to the former Confederate position but were again halted by the Southerners who had fallen back to a secondary line near the hill's geographic crest.

With the pressure against his right increasing, Johnson called the remaining two regiments of the Army of the Northwest to the scene of the fighting (TABLE 5B). Both the 25th Virginia and the 31st Virginia, which had been posted near the turnpike at the bottom of the hill, were brought to the top of Sitlington's Hill and posted on the threatened right.⁴⁷⁰ Additionally, upon hearing the increased fire from the battlefield, Brig. Gen. Taliaferro moved his brigade down the turnpike to a closer supporting position from which he could move to Johnson's aid if needed.⁴⁷¹ With the addition of fresh troops and the inherent natural strength of their secondary position, the Confederates easily stabilized their line. Col. MacLean noted that "The

⁴⁶⁸Ibid.

⁴⁶⁹Ibid. Also 471 Jackson. In the reports of various commanders, reference is made to the difficulties in seeing the opposing lines despite the relative lack of heavy vegetation.

⁴⁷⁰Ibid, 471. Jackson.

⁴⁷¹Ibid, 480. Taliaferro.

enemy were in position on top of the mountain entirely screened from our view, and the conformation of the ridge permitted them to deliver their fire with only the exposure of a small portion of their bodies, and in reloading they were entirely protected from our fire by the crest of the hill.⁴⁷² Still, the two Federal regiments continued to slug it out with the Confederate line for about an hour and a half with neither side making any substantial headway towards dislodging the other.

At around 3:00 p.m., Capt. George R. Latham, of the 2d West Virginia, reported to Milroy that the Confederates were attempting to place an artillery battery on a commanding position atop the hill.⁴⁷³ Although there is little evidence to support the truth of Latham's assertion, his report influenced Milroy's next decision. Other Federal scouts had reported enemy reinforcements, probably Johnson's remaining two regiments, arriving at the wooded area on the right of the Confederate position.⁴⁷⁴ To further determine Confederate intentions, Milroy now requested permission to make a reconnaissance in force--actually an attack--against the Southern line.⁴⁷⁵ Schenck approved the junior brigadier's proposal and assigned three additional regiments to assist the two Ohio units already engaged. The 82d Ohio, 32d Ohio, and 3d West Virginia were detailed to Milroy for this work. Additionally, one 6-pounder artillery piece of Capt. Aaron C. Johnson's 12th Ohio Battery was emplaced on the

⁴⁷²Ibid, 468. MacLean.

⁴⁷³Ibid, 465. Milroy.

⁴⁷⁴Ibid, 463. Schenck.

⁴⁷⁵Ibid, 466. Milroy.

Federal left to assist in the attack. Although two more-powerful 12-pounder guns were also detailed to support this offensive push, delays in moving them into position prevented their effective use.⁴⁷⁶

Gen. Johnson was on a personal reconnaissance near a slight hill to the right of the 44th Virginia, the unit anchoring the Confederate right flank, when the Union troops opened their attack at 4:30 p.m. against the Southern right and center.⁴⁷⁷ The opposing lines delivered a heavy volume of fire into each other as the Federals moved up the steep slope. The sounds of the battle were heard for miles around. Topographic engineer Jedediah Hotchkiss, 2 miles away at army headquarters, clearly heard the opening of the Federal attack and quickly rode to rejoin Jackson on the turnpike near the base of the hill.⁴⁷⁸ At Crab Orchard, 15 miles from McDowell, on the eastern slope of Cheat Mountain, one Federal soldier on picket duty noted in his diary that the sounds of battle could easily be heard from his distant position.⁴⁷⁹ As the sounds of battle became general and more intense, Jackson dispatched Hotchkiss to the hilltop to determine the status of the now raging battle.⁴⁸⁰ Jackson

⁴⁷⁶Ibid.

⁴⁷⁷Ibid, 483. Johnson.

⁴⁷⁸Hotchkiss MS.

⁴⁷⁹Thomas Evans, Manuscript. Transcript diary, 1862-1863. Manuscript Division, Library of Congress, Washington, D.C. Diary entry of 8 May. Evans, who was a member of the lone company of the 25th Ohio not present at the battle, further stated that the officer in charge of the unit declined suggestions to march towards the sound of the guns and opted instead to stay in their present position and await word of the battle's outcome.

⁴⁸⁰Hotchkiss, 40.

also ordered Taliaferro's brigade to reinforce Johnson's position atop Sitlington's Hill.⁴⁸¹

Upon their arrival, Taliaferro's regiments were quickly thrown into the Confederate line to repel the Federal assault.⁴⁸² To support Johnson's 25th Virginia, which was running low on ammunition, the 23d Virginia was deployed forward along the crest of the hill. The 37th Virginia was sent to the extreme right flank and immediately charged headlong down the slope in an effort to break up the attacking Union formation that was threatening to collapse the Confederate flank. The 10th Virginia was divided into two formations to provide support to different areas along the line. Four companies were dispatched to support the Confederate center between the 52d Virginia and the 12th Georgia. Accompanied by elements of the 52d, these four companies moved down the hill a short distance and delivered a withering enfilade fire into the right flank of the attacking Union troops. The remaining six companies of the 10th Virginia moved to the right of the recently arrived 23d Virginia. Taliaferro's fresh troops were enough to repel the initial Union assault and steady the Southern lines (MAP 10).

As Johnson realized that the immediate threat caused by the Federal attack had diminished, Taliaferro's regiments were moved into more advantageous positions. The 23d Virginia was now sent to support the 12th Georgia in the Confederate center. Following their successful charge against the Federals and return back up the hill, the

⁴⁸¹O.R., Vol. 12, Pt. 1, 472. Jackson.

⁴⁸²Ibid, 481. Taliaferro.

37th Virginia was positioned in the void left by the 23d Virginia. The four companies of the 10th Virginia which had been sent to aid the 12th Georgia now rejoined their regiment which was posted on a small eminence protecting the right and rear of the Southern line.⁴⁸³

Although the initial Union assault had been repulsed, the fighting continued to be heavy along the opposing lines. Around 6:30 p.m.⁴⁸⁴ Jackson ordered the regiments of Campbell's brigade to support Johnson. The 1st Virginia (Irish) Bn. led Campbell's line of march, followed by the 48th Virginia and 21st Virginia, while the 42d Virginia brought up the rear.⁴⁸⁵ As the column moved along the turnpike towards the path leading up the hill, the Southern troops came under fire by Federal skirmishers. After the commanding officer of the 48th Virginia was wounded and the two senior captains declined the position, the adjutant, Lt. Hale, assumed command of the regiment. Hale then led the unit up the hill and formed to the left of the 12th Georgia and in front of the 58th Virginia, which was running low on ammunition. The 1st Virginia (Irish) Bn. also moved to support the 58th. To guard the point where the path leading up Sitlington's Hill met the turnpike, the best route for retreat in case of a Confederate reversal, the 21st Virginia was formed in line of battle across

⁴⁸³Ibid.

⁴⁸⁴Ibid, 480. Report of Capt. Leigh, commanding the 1st Virginia (Irish) Bn. Although some of Campbell's subordinates disagree as to the exact time the movement began, 6:30 p.m. would keep this movement in a logical chronology with the rest of the action taking place.

⁴⁸⁵Ibid, 478. Report of Lt. Hale, adjutant and acting commander of the 48th Virginia.

the road.⁴⁸⁶ Finally, the 42d Virginia was positioned to the right of the 44th Virginia and, therefore, now formed the extreme right of the Confederate position.⁴⁸⁷

As darkness began to fall, the level of firing began to diminish. Union forces continued their attempts to advance against the Confederate left, however, and around twilight one Federal unit was able to use the diminishing light to advance to within 50 yards of the 58th Virginia before being discovered and repulsed.⁴⁸⁸ Although the moon was shining that night, the light was still insufficient for accurate firing.⁴⁸⁹ Instead, the opposing soldiers were often guided in their firing simply by the muzzle flashes from enemy rifles.

At around 8:00 p.m., Brig. Gen. Johnson was wounded in the leg by Federal rifle fire.⁴⁹⁰ Because Jackson had remained with those units posted along the turnpike throughout the day, Johnson had been the senior Confederate commander on the field during the battle. With his wound rendering him unfit for further service on the field, Johnson passed command to Taliaferro.

After four hours of combat, most of the Federal regiments were beginning to run low on ammunition. Although Schenck dispatched three ordnance wagons to resupply Milroy's troops, the difficulties of passing the ammunition up the steep hill

⁴⁸⁶Worsham, 64.

⁴⁸⁷O.R., Vol. 12, Pt. 1, 477. Report of Maj. Lane, commanding the 42d Virginia.

⁴⁸⁸Ibid, 486. Scott.

⁴⁸⁹Ibid, 469. MacLean.

⁴⁹⁰Ibid, 483. Johnson.

from the wagons slowed this effort.⁴⁹¹ Presented with the problem of ammunition resupply and the obvious lack of Federal offensive progress, Milroy decided to break off the attack.⁴⁹² Shortly after 9:00 p.m., the four Federal regiments that had taken part in the attack reformed on the road at the base of the hill and marched back to McDowell. Schenck deployed the 5th West Virginia to support the other Union units during the withdrawal but no Confederate counterattack developed.⁴⁹³

For the next several hours, the Confederates on Sitlington's Hill remained in position ready to repel any further Federal attacks. Although the Northerners' fire had ceased, it remained unclear if they were preparing for another attack or had withdrawn from the field. Evidence of a Federal withdrawal became evident, however, when the Confederates observed "...extensive camp fires beyond the river and [Federal] artillery was heard moving off toward their rear."⁴⁹⁴ As the night continued, Southern soldiers could also see the enemy burning some supplies in the town.⁴⁹⁵ At 2:00 a.m. on the 9th, the Federal infantry began its withdrawal from the town. Because this movement remained unchallenged by the Confederates, the Federals were able to evacuate the town without the loss of a single man. Although

⁴⁹¹Ibid, 464. Schenck.

⁴⁹²Ibid, 467. Milroy.

⁴⁹³Ibid, 464. Schenck.

⁴⁹⁴Ibid, 481. Taliaferro.

⁴⁹⁵Worsham, 65.

Schenck was forced to abandon some arms and ordnance which could not be transported, the majority of Federal supplies were also successfully removed.⁴⁹⁶

Most of the Confederate units remained on Sitlington's Hill throughout the night with neither rations nor fires.⁴⁹⁷ At 11:30 p.m., realizing that the threat of a renewed Federal attack had faded, Jackson ordered Taliaferro's brigade back to its wagons for provisions.⁴⁹⁸ The Army of the Northwest and Col. Campbell's 2d Brigade remained on the hill until the next morning when they too were finally marched back to their wagons for the issuance of rations.⁴⁹⁹

The battle itself had been a confusing, and poorly orchestrated fight for both sides. While Jackson and Schenck, the senior commanders of the respective armies, exercised general control over their forces, they played almost no role in determining the outcome of the battle itself. Instead, both senior commanders had left the leadership of forces engaged on the field of battle to subordinate officers. Both the Federals and Confederates had also failed to effectively concentrate their forces for any decisive engagement. In each case, less than half of the available manpower was used for the actual fighting. This lack of concentration had, in turn, been supplemented by a general lack of coordination in bringing units into action.

⁴⁹⁶O.R., Vol. 12, Pt. 1, 464. Schenck.

⁴⁹⁷Ibid, 477. Lane.

⁴⁹⁸Ibid, 481. Taliaferro.

⁴⁹⁹Ibid, 479. Hale.

In a general evaluation of the battle performance of each army, the Federals would arguably have to be rated higher. By unexpectedly launching a preemptive spoiling attack against the Confederates on Sitlington's Hill, the Northern commanders had seized the tactical initiative and retained it throughout the battle. Further, by maintaining this offensive spirit during the fight, the Union commanders had forced Johnson to react to their own moves rather than allowing the Confederates to dictate the terms of the clash. When the benefits of the attack were determined to be diminishing, the Federals had successfully broken contact with the Southern enemy and had begun their withdrawal unbothered by any immediate pursuit. Finally, perhaps the best illustration of superior Federal performance on the tactical level was the casualty list of the battle (TABLE 6). Although the Union troops had numbered only about 6,000 compared to Jackson's force of 9,000, the Northern soldiers had inflicted twice the number of casualties as they had suffered. Maj. Harman, Jackson's ever critical quartermaster, provided a scathing assessment of the Southern performance in a letter to his brother in which he charged that:

We have been worsted by miss-management. I am more than ever satisfied of Jackson's incompetency...We have the battle-field but no victory. Our loss has been severe and heavy.⁵⁰⁰

Despite this tactical superiority by the Union force, the battle remained an operational victory for the Confederates. While the Federals retreated northward, the Confederates were left in possession of the field and remained generally unchecked

⁵⁰⁰Harman MS. Letter of 9 May to Maj. A.W. Harman, Commandant of the Confederate post at Staunton.

in their advance against Fremont's scattered units. Jackson had successfully regained the operational offensive and had brought his combined force into action against an isolated, numerically inferior Federal unit.

Confederate intelligence efforts during the battle, like the course of the fighting itself, had been generally inadequate. The most glaring shortcoming of course had been Jackson's failure to recognize the possibility of a preemptive Union attack against Sitlington's Hill. This failure to discern the enemy's intent had perhaps been the major factor behind the Confederates' lack of force concentration and poor coordination in bringing additional forces to the scene of the battle. Despite the initial view of enemy dispositions from the vantage point on Sitlington's Hill and the subsequent Federal skirmisher probes, Jackson had ignored the indications of a Union attack and had instead concentrated on his plan for an attack against McDowell the following day.

This shortcoming had been exacerbated by Jackson's detachment from the field of battle throughout the fight. Although Brig. Gen. Johnson had capably deployed his available units to meet each Federal threat, Jackson's immediate presence on the hill would have allowed the senior Confederate commander to remain more attuned to the tactical situation and to exploit potential opportunities by more efficient use of the combined Confederate force. While the use of staff officers had helped to keep Jackson informed about the general course of the battle, the Confederate commander failed to keep himself in a position where his use of available intelligence would have allowed him to positively influence the course of the battle.

Overall, the Confederates had failed to initiate any active tactical intelligence during the battle. Instead of ordering skirmisher elements or reconnaissance parties forward to locate any potential weaknesses in the disposition of the attacking Federal formations, Johnson had assumed a static defensive position in which he merely reacted to the Union assaults and moved his subordinate units to meet each new threat. Thus, the Southerners relied almost exclusively on the reaction to unevaluated tactical information rather than an overt effort to identify tactical opportunities through the use of combat intelligence.

In contrast, Federal intelligence during the battle had been competently planned and executed. The general intelligence assessment of the enemy situation and the region's terrain had been the foundation for Schenck's decisions to withdrawal from the area and to make a preemptive attack on the Confederate position. Skirmisher parties and scouts had been specifically engaged to determine potential weak points in the Confederate defense and information provided by these tactical reconnaissance efforts had then provided the basis for decisions on when and where to attack the enemy lines. Milroy had used intelligence provided by tactical observers as the basis for his decisions to assault the Confederate position at 4:30 p.m. when it appeared that the enemy threat might be growing and later to withdraw his forces from the hill when it appeared that little progress was to be made by prolonging the attack. Although Schenck had remained detached from the actual field of combat, the communications between he and Milroy had been sufficient for the Federals to use

their available forces to act upon opportunities and requirements suggested by tactical intelligence.

C. THE PURSUIT TO FRANKLIN

The Federal retreat from McDowell remained organized and well-disciplined in the wake of the battle. Brig. Gen. Schenck maintained effective control over his force and began moving north for a junction with the rest of Fremont's army (MAP 11). "From McDowell", Schenck stated, "I fell back by easy marches...the enemy cautiously pursuing."⁵⁰¹ On the 9th, Schenck halted his command and prepared for battle on a "commanding ridge" near the intersection of the McDowell and Monterey roads but then continued his retrograde movement when no sizeable enemy force appeared in his rear. Although most of the Confederate forces were still near McDowell, Jackson had ordered cavalry under Capt. Sheetz to begin the pursuit.⁵⁰² Later that day, Confederate horsemen captured six Federal soldiers of the 55th Ohio who had been left as rear guard pickets near the road intersection.⁵⁰³ Fear that "The rebel cavalry must soon be on us" helped to hasten the movements of other Federal pickets in rejoining the main body of retreating Northern soldiers.⁵⁰⁴

⁵⁰¹O.R., Vol. 12, Pt. 1, 464. Schenck.

⁵⁰²Ibid, 473. Jackson.

⁵⁰³Ibid, 491. Skirmish report of Col. John C. Lee, commander of the 55th Ohio. The Federal picket had consisted of just 20 men under the command of Lt. R.F. Patrick.

⁵⁰⁴Evans MS. Diary entry for 9 May.

In accordance with orders issued the previous evening by Jackson, Jedediah Hotchkiss set out at 3:00 a.m. on the 9th to determine whether the Federals had, in fact, evacuated McDowell and, if not, to find an appropriate route for the movement of artillery up Bull Pasture Mountain so that the battle could be resumed with a Southern advantage.⁵⁰⁵ The infantry pickets who accompanied the staff officer soon reported the enemy gone and this word was, in turn, relayed to Jackson. Hotchkiss immediately began mapping the battlefield of the previous day and the area around the Federal camp.⁵⁰⁶ The topographer also accompanied Col. Crutchfield, Jackson's Chief of Artillery, on a survey of the abandoned Federal equipment and ordnance at McDowell.

Following the tough and poorly orchestrated little fight of the day before, the Confederate commander allowed his troops a day of rest before beginning the pursuit of the enemy.⁵⁰⁷ Sheetz' cavalry could harass, and hopefully delay, the Federals until the Confederate infantry was ready to resume the march. On the morning of the 10th, the Confederates began their pursuit at an early hour, proceeding up the Parkersburg road about 6 miles and then turning onto a road which led northeast

⁵⁰⁵Hotchkiss, 40.

⁵⁰⁶Ibid, 42.

⁵⁰⁷Ibid.

towards the town of Franklin.⁵⁰⁸ The VMI cadets and a small body of cavalry were left behind to guard and transport the few Federal prisoners back to Staunton.⁵⁰⁹

While Jackson began his pursuit of Schenck and Milroy, he remained well aware of the potential threat offered by Banks' substantial force in the Valley. With only Ashby's Confederate cavalry opposing him to the south, Banks might easily drive towards Staunton and cut off Jackson's main supply and retreat routes. Alternatively, Banks might seek to reinforce the fleeing Federals through any of the three passes that linked the Valley with the area near Franklin. Jackson had issued strict orders to the post quartermaster in Staunton for the withdrawal of supplies if Banks should attempt a southward advance. However, Jackson did "...not think Banks will go to Staunton...."⁵¹⁰ Although Banks clearly had the capability to seize Staunton, Jackson had correctly deduced that this was not the Union commander's intent. Sometime during the afternoon of the 10th, Jackson also took concrete action "To prevent Banks from re-enforcing Milroy...." through any of the three mountain gaps which led from the Alleghennies to the Shenandoah Valley.⁵¹¹ The Confederate general beckoned to his trusted topographer Jedediah Hotchkiss and then led the staff officer a short distance from the road on which the rest of the army was marching. In a hushed tone Jackson tersely stated:

⁵⁰⁸Ibid. Diary entry for 10 May.

⁵⁰⁹O.R., Vol. 12, Pt. 1, 473. Jackson.

⁵¹⁰Harman MS. Letter of 9 May.

⁵¹¹O.R., Vol. 12, Pt. 1, 472. Jackson.

General Banks is in Harrisonburg, General Fremont is at Franklin, there is a good road between them. Gen. Fremont ought to march to Gen. Banks but I don't think he will do it, I want the road between them ... blockaded by daylight tomorrow....⁵¹²

Hotchkiss was to "...blockade the roads through North River and Dry River Gaps, while a detachment of cavalry obstructed the road through Brock's Gap."⁵¹³ Additionally, in order to keep Jackson informed about any enemy sightings and the progress of the expedition, Hotchkiss was ordered to send couriers back to Jackson hourly.⁵¹⁴

By the morning of the 11th, the Confederate parties had successfully blocked the assigned routes. The tangled obstacles which Hotchkiss created across the narrow country roads would be difficult for any military force to remove quickly. As Gen. Fremont later attempted to make the crossing he complained that "Bridges and culverts had been destroyed, rocks rolled down, and in one instance trees felled across the way for the distance of nearly a mile."⁵¹⁵ As part of his general scouting duties, Hotchkiss had also sent word to Jackson of the presence of Federal cavalry in Harrisonburg and near Muddy Creek on the Rawley Springs road.⁵¹⁶

⁵¹²Hotchkiss MS. Well written post-war recollection of Hotchkiss' service at McDowell and during the subsequent pursuit.

⁵¹³O.R., Vol. 12, Pt. 1, 472. Jackson.

⁵¹⁴Hotchkiss, 44. Diary entry for 10 May.

⁵¹⁵O.R., Vol. 12, Pt. 1, 11. Fremont's inclusive report of operations in Virginia during 1862.

⁵¹⁶Hotchkiss, 44.

Also on the 11th, while the Confederates were engaged in the obstruction of the passes, the retreating Federals had reached the vicinity of Franklin. Here Schenck halted to await the arrival of reinforcements under Maj. Gen. Fremont and established a strong blocking position in a "...narrow valley between the mountain hills...."⁵¹⁷ The heavily wooded hills on both sides of the town offered good protection along the Federal flanks while the narrow valley in which the road was situated allowed the Federals to concentrate their defense. As an added protective measure, the Union forces had also set fire to the woods on either side of their blocking position. The arrival of Confederate forces near Franklin that afternoon was promptly reported to Schenck by Federal scouts who had been posted about 2 miles forward of the blocking position.⁵¹⁸ The strength of the Federal position, combined with the effects of the fire and smoke, prevented Jackson's force from continuing its advance. Union artillery batteries, concealed from enemy observation by the heavy forest as well as the effects of fire and smoke, occasionally shelled the Confederates, thereby forcing the Southerners to maintain their distance from the Federal forces. Despite repeated attempts by Confederate scouts and skirmishers to locate the enemy artillery emplacements for effective counter-battery fire, the Federal guns remained hidden from view.⁵¹⁹

⁵¹⁷Worsham, 66.

⁵¹⁸O.R., Vol. 12, Pt. 1, 464. Schenck.

⁵¹⁹Worsham, 66.

Although his pursuit of the Federals had been halted, Jackson did not immediately break off his contact with the enemy forces near Franklin. Throughout 12 May the Southerners remained in front of the Federal units. Jackson knew that Federal reinforcements were on their way and decided to reconnoiter the enemy position himself before continuing any offensive moves.⁵²⁰ Following this reconnaissance, Jackson reasoned that:

The junction between Banks and Milroy having been prevented, and becoming satisfied of the impracticability of capturing the defeated enemy, owing to the mountainous character of the country being favorable for a retreating army to make its escape, I determined, as the enemy had made another stand at Franklin, with a prospect of soon being re-enforced, that I would not attempt to press farther, but would return to the open country of the Shenandoah Valley, hoping, through the blessing of Providence, to defeat Banks before he should receive re-enforcements.⁵²¹

Because Sunday religious services had been omitted the previous day, Jackson ordered divine services to be held throughout his command that afternoon.⁵²² Later that day, Jackson also issued a letter of congratulations to his command for their victory at McDowell.⁵²³ The soldiers were rested and supplies were reissued to the brigades.

⁵²⁰O.R., Vol. 12, Pt. 3, 887. Jackson to Ewell, 12 May.

⁵²¹O.R., Vol. 12, Pt. 1, 473. Jackson.

⁵²²Hotchkiss, 45. Diary entry of 12 May.

⁵²³Jackson MS, Letters, 225.

Aware that Fremont was now nearby with at least "seven dutch regiments",⁵²⁴ Jackson abandoned his position opposite Franklin on the morning of the 13th and began "...falling back towards McDowell."⁵²⁵ At 10:00 a.m., Union Gen. Fremont, who had "...anticipated while at New Creek...a movement of the enemy in this direction....", finally arrived in Franklin with his advance brigade.⁵²⁶ Fremont had departed New Creek on the 5th but had delayed any rapid movement towards Franklin because of his own perceptions of the unpreparedness of his troops for combat⁵²⁷ and such unnecessary proceedings as a general review of troops in Petersburg on the 11th.⁵²⁸ Despite the issuance on the 13th of Jackson's famous marching orders,⁵²⁹ the Confederate troops only marched about 11 miles before

⁵²⁴Harman MS. Letter dated 15 May 1863. The "dutch regiments" referred to were probably Blenker's recently arrived regiments which contained large numbers of German immigrants.

⁵²⁵Ibid.

⁵²⁶O.R., Vol. 12, Pt. 1, 461. 16 May message of Fremont to Stanton.

⁵²⁷Ibid, 8. Fremont's general report of operations in Virginia from March to June, 1862.

⁵²⁸Jacob J. Frank, Manuscript. Diary, 1862. Manuscript Division, Library of Congress, Washington, D.C. Diary entry of 11 May by Jacob J. Frank, a soldier in the 41st New York.

⁵²⁹Jackson MS, Letters, 227. Although Jackson's orders were not unique in their prescriptions for times and rates of movement or for the disposition of troops during the march, Jackson's strict implementation of these orders helped to bring notoriety to his infantry as "foot cavalry" because of their ability to move quickly over great distances.

bivouacking for the night.⁵³⁰ On the 14th, Jackson's army reached the area around McDowell.⁵³¹

With Taliaferro's brigade now forming the Confederate advance, Jackson moved east from McDowell and towards Staunton on the 15th. The army passed through Jennings's Gap and Stribling Springs before establishing camp at Lebanon Springs.⁵³² In accordance with an executive proclamation issued by Confederate President Davis, Jackson's troops observed "...a day of humiliation and prayer for the pardon of sins..."⁵³³ on the 16th in which all active field operations were suspended. The Confederate army again resumed its march on the following day with Taliaferro's advance reaching the vicinity of Bridgewater before establishing camp while the rear elements and Jackson's own staff bivouacked near Mt. Solon.⁵³⁴

Throughout Jackson's pursuit of Schenck and subsequent movement back towards the Valley, the Confederate commander had remained in habitual communication with Gen. Ewell concerning the status of the Federal forces under Banks. In letters on the 9th and 10th Jackson had reiterated the importance of Ewell's watch over Banks. As he began his northward movement towards Franklin on the 10th, Jackson had suggested that he would attempt to get in Banks' rear and requested that Ewell

⁵³⁰Worsham, 66.

⁵³¹Hotchkiss, 45. Diary entry of 14 May.

⁵³²Ibid. Diary entry of 15 May.

⁵³³Jackson MS, General Orders, 46.

⁵³⁴Hotchkiss, 46. Diary entry of 17 May.

press the Federals if they should begin to fall back. Attached to this message had been an inquiry whether Ewell could use his own cavalry regiments to watch Banks and dispatch Ashby to assist in the pursuit of Schenck.⁵³⁵ Although Ewell met personally with Ashby on the 11th to discuss the enemy situation and the possibility of sending Ashby to Jackson's aid, new intelligence suggested that a move by Banks' Federals was imminent and, therefore, Ashby's departure was suspended.

On the afternoon of 11 May, Ewell received valuable intelligence of Federal intentions in the Valley. From a Federal deserter it was learned that Shields' Division was again preparing to leave the Valley to join the Union armies operating east of the Blue Ridge.⁵³⁶ The presence of three days' rations on two Federal prisoners further confirmed Union preparations for movement. In fact, Shields' Federal division had been ordered on 1 May to join Gen. McDowell's force near Fredericksburg and the movement for this junction was about to begin.⁵³⁷ On the night of the 11th, Ewell personally briefed Col. Munford, commander of the 2d Virginia Cavalry, on the suspected location and destination of Shields' force and ordered the Southern horseman to track the Federal movements.⁵³⁸

⁵³⁵O.R., Vol. 12, Pt. 3, 886. Jackson to Ewell from headquarters at McDowell, 10 May.

⁵³⁶Freeman, 356.

⁵³⁷O.R., Vol. 12, Pt. 1, 124. Message by Gen. Irvin McDowell to Secretary of War Stanton.

⁵³⁸Freeman, 357.

The next morning Munford's regiment departed Conrad's Store to watch and harass Shields' division. On the 13th, Gen. Ewell received word of a body of Federals moving across the Masanutten from New Market towards Port Royal. Although Ewell passed this information to Jackson, the senior Confederate commander responded that, in his opinion, Banks had no intention of leaving the Valley but was attempting to place his forces so as to cover Winchester and also cooperate with Fremont. Jackson then suggested that Ewell use the spy, McVicar, to help determine if the Federals were, in fact, planning a move towards Fredericksburg.⁵³⁹ By the 16th, however, Col. Munford confirmed that Shields' force, which the Confederates noted as being "...about 7,000 strong, with thirty-six pieces of artillery and two companies of cavalry....,"⁵⁴⁰ had crossed the Blue Ridge at Chester Gap and was now headed towards Warrenton for a junction with Gen. McDowell.⁵⁴¹

While Ewell had been concerned with the tracking of Shields' force and the determination of Federal intentions, he had also been plagued by a complex and confusing military chain of command which inhibited his ability to follow superiors' orders. With the movement of his division into the Valley District, Ewell had, of course, become subordinated to Jackson. However, Gen. Joseph Johnston, commander of the Army of the Peninsula and senior commander of all Confederate field forces in Virginia, also exercised command authority over both Jackson and Ewell. Finally,

⁵³⁹O.R., Vol. 12, Pt. 3, 887-888. Letters of Jackson to Ewell, 12 and 13 May.

⁵⁴⁰Ibid, 892. Gen. Lee to Jackson, 16 May.

⁵⁴¹Ibid, 894. Gen. Lee to Gen. Johnston.

Gen. Robert E. Lee, although devoid of any real command authority in his capacity as senior military advisor to President Davis, occasionally issued suggestions or orders from the President directly to commanders in the field.

Ever since Jackson had begun the expedition against Fremont's forces, conflicting messages and orders had been arriving at Ewell's headquarters near Conrad's Store. Throughout the campaign, Jackson had stressed the need for Ewell to keep a close watch on Banks and to threaten the Federal commander's flank from the Luray Valley. Banks' retreat from Harrisonburg had led Jackson to recognize the potential for a combined offensive against the Federals in the Valley and he had alluded to this possibility in a 10 May letter to Ewell. Despite evidence of Shields' departure from the Valley, Jackson still believed that Bank's main body was not preparing to move east. On 14 May Jackson had ordered Ewell to follow the Federals down the Valley, using Ashby and any other cavalry to harass the Union column and to disrupt the Manassas Gap Railroad.⁵⁴² By the 17th, Jackson was firmly convinced that a combined attack against Banks would offer the chance of success with strategic implications and ordered Ewell to be prepared to join him near New Market on the 21st.⁵⁴³

Although Jackson had consistently urged Ewell to remain in the Luray Valley to watch and threaten Banks, Lee had written on 6 May that there was little need for

⁵⁴²O.R., Vol. 12, Pt. 3, 889. Jackson to Ewell, 7:20 a.m., 14 May.

⁵⁴³Ibid, 894.

Ewell to remain in that position if the Federals had retreated from Harrisonburg.⁵⁴⁴ Suspecting that Banks might attempt to reinforce Gen. McDowell, Lee had suggested on 8 May that Ewell should attack Banks on the march if the Federals moved from the Valley.⁵⁴⁵ Although Lee continued to stress the desirability of preventing Banks from moving east,⁵⁴⁶ by the 14th he too had revised his operational assessment and now suggested a combined offensive by Ewell and Jackson against Banks.⁵⁴⁷

On the 13th, Ewell had received orders from Gen. Johnston which also promoted a combined attack against Banks when Jackson returned to the Valley. However, Johnston also ordered that, if Banks crossed the Blue Ridge, then both Ewell and Jackson should do the same.⁵⁴⁸ The movement of Shields' division, which had been a major subordinate element of Banks' command, was seen by Johnston as ample justification for a similar movement by the Confederates and, on 17 May, Johnston issued orders requiring Ewell to move east of the Blue Ridge. Although Jackson had previously suggested the plausibility of a combined Confederate attack in the Valley, Johnston now believed that any attack against Banks' fortifications would be too costly. Instead, Johnston thought that Jackson could simply observe Banks while Ewell moved east towards Richmond. In his letter to Ewell, Johnston stressed the

⁵⁴⁴Ibid, 881.

⁵⁴⁵Ibid, 884-885.

⁵⁴⁶Ibid, 892. 16 May letter from Lee.

⁵⁴⁷Ibid, 889. 14 May message from Lee to Jackson and Ewell.

⁵⁴⁸Ibid, 888. Johnston to Ewell from headquarters in New Kent County, 13 May.

importance of the contest before Richmond - "We want troops here; none therefore, must keep away, unless employing a greatly superior force of the enemy."⁵⁴⁹ After reading the orders himself, Ewell was directed to forward them to Jackson for the latter's written endorsement.

These most recent orders from Johnston were the final straw for the volatile Ewell. Although he had consistently been able to modify his own operational plans to meet the intentions of superiors, Ewell now believed that a prime opportunity would be lost if his division left the Valley District. The combative division commander clearly understood the potential benefits of a combined attack against Banks. Johnston's orders, however, would negate any chance for success in the Valley. Rather than simply forwarding the orders to Jackson, Ewell decided to deliver them himself. On the evening of the 17th, Ewell rode to confer with Jackson at Mt. Solon and arrived in the town the following morning.⁵⁵⁰

After presenting Jackson with a copy of Johnston's orders, Ewell explained the obvious dilemma now facing him. Although Ewell recognized the strategic potential of a continued offensive in the Valley, he could not blatantly ignore orders from his superior. After some thought, Jackson arrived at a temporary solution. In his written endorsement to Johnston's orders, Jackson directed Ewell to suspended their execution.⁵⁵¹ The senior major general then sent a telegraph message to Gen. Lee

⁵⁴⁹Ibid, 896.

⁵⁵⁰Hotchkiss, 46. Diary entry of 18 May.

⁵⁵¹O.R., Vol. 12, Pt. 3, 897.

in which he asked Lee to help persuade Johnston to approve the plan for a combined offensive against Banks. Jackson would not await a formal reply from superiors before making his next move, however. To Ewell, Jackson now issued the following order:

HEADQUARTERS VALLEY DISTRICT,
Mount Solon, May 18, 1862.

Maj. Gen. R.S. EWELL,
Commanding Third Division, Army of the Peninsula:

GENERAL: Your letter of this date, in which you state that you have received letters from Generals Lee, Johnston, and myself requiring somewhat different movements, and desiring my views respecting your position, has been received. In reply I would state that as you are in the Valley District you constitute part of my command. Should you receive orders different from those sent from these headquarters, please advise me of the same at as early a period as is practicable.

You will please move your command so as to encamp between New Market and Mount Jackson on next Wednesday night, unless you receive orders from a superior officer and of a date subsequent to the 16th instant.

I am, general, your obedient servant,
T.J. JACKSON,
Major-General⁵⁵²

As a subordinate, legally acting under orders from a superior, Ewell could no longer be held accountable for disobedience of Johnston's 17 May order. Jackson had willingly accepted full responsibility for retaining Ewell's division in the Valley and for the plan to use that force against Banks. Their conference over and satisfied with the meeting's outcome, Ewell left Jackson's camp at Mt. Solon that afternoon and returned to his own brigades in the Luray Valley. Jackson and Ewell planned to unite

⁵⁵²O.R., Vol. 12, Pt. 3, 897.

their forces near New Market on 21 May. The stage was now set for the next act in Jackson's offensive.

D. INTELLIGENCE DURING THE EXPEDITION TO MCDOWELL

Confederate intelligence during this phase of Jackson's offensive had been skillfully managed. The Confederate commander, acting as his own operational planner, had kept the intelligence effort focused on those key subjects which were of significance to his operational plan. The successful engagement of those elements of Fremont's army which had been opposing Gen. Johnson remained the main operational objective throughout the period and Jackson had used his intelligence assets as a primary means of determining when and where to strike at the Federal forces in the Alleghennies. General situational data provided by Johnson, geographic information provided by Hotchkiss and his maps, and reconnaissance reporting from tactical units and scouts had all supported the Confederate commander's efforts to locate the Federals and determine their size and general disposition. Additionally, because the movements and activities of Banks' Union force could have a profound effect on Jackson's operational plan, the Confederate chief had also taken measures to ensure that any changes in the enemy situation near Harrisonburg would be detected and reported in a timely manner. Jackson's operational control over Ashby and Ewell had allowed him to task these subordinate commanders with intelligence collection tasks that would help to ensure the success of his operation in the west. Rather than relying on these commanders to determine those elements of information which might be of significance to Jackson, the senior Southern general had issued

detailed instructions and questions to these subordinates to guide them in their intelligence collection efforts.

Additionally, the operational focus that Jackson applied to his employment of intelligence allowed the Confederate commander to better recognize potential threats and opportunities suggested by that intelligence. Just as the reported movement of Fremont's reinforcements to Franklin had suggested an increased threat to Jackson's army, the initial reports of Milroy's isolated position, the news of Banks' withdrawal to and fortification of Strasburg, and Ewell's confirmation of Shields' departure from the Valley had all suggested opportunities that profoundly shaped Jackson's operational planning.

In addition to the operational focus provided by Jackson's control over the intelligence effort, this centralization of Confederate intelligence also led to an increased ability to fuse information from all available sources into a unified picture of enemy dispositions and intentions. While tactical reporting from Sheetz's cavalry during the pursuit to Franklin effectively tracked the fleeing Federals, the combination of this information with an understanding of the region's geography and reports of Banks' movements allowed Jackson to recognize the benefits offered by blocking the mountain passes into the Shenandoah Valley. In another example, while individual reports from Ashby and Ewell might have provided some indications of Bank's general movements and capabilities, the combination of various reports from Ashby's scouts, Ewell's spies, and Munford's cavalry allowed Jackson to deduce

Federal intentions in that part of the Valley and to propose a combined offensive against Banks.

One of the key factors in Jackson's successful handling of Confederate intelligence had been his own understanding of the capabilities and limitations of this intelligence effort. As the operational commander controlling all of the Confederate intelligence collection assets, the Southern general had clearly recognized that some uncertainty regarding the enemy would always exist, despite whatever extensive intelligence efforts he might initiate. Although Jackson made extensive use of spies, cavalry scouts, special reconnaissance parties, maps, and his own knowledge of the art of war as means of determining the enemy situation, he also recognized the inherent inadequacies in all of these sources and therefore sought to use these assets in a combined effort to augment their overall reliability. Additionally, Jackson had realized the inability of even the best intelligence to provide a prescriptive course of action by dispelling all doubt about future enemy actions and had, therefore, taken action even when the situation was somewhat unclear. The evolving plan to make a combined attack against Banks, the decision to break off the pursuit at Franklin, and the faulty decision to delay offensive action on 8 May had all been made by Jackson with the realization that intelligence and its use was an imperfect art.

The poor performance of Confederate intelligence during the battle at McDowell had arguably been the low point of the Southern effort throughout this phase of operations. Jackson's incorrect assessment of Federal intentions, the Confederate commander's detachment from a position of influence on the battlefield, Johnson's

failure to initiate any active tactical level intelligence during the battle, and the failure to exploit any opportunities provided by tactical information all contributed to this inadequate showing. Perhaps most significant, though, was a general inability to translate successful operational level intelligence to the tactical level during preparations for battle. As has been noted, the Confederate operational intelligence effort, which supported Jackson's overall campaign planning and movements, had been generally successful. As at Kernstown, however, the Confederates had been unable to equate the same type of energy, operational focus, and fused reporting into tactical intelligence preceding or during the battle. After making an initial assessment of the situation, Jackson had failed to develop any kind of active and aggressive reconnaissance plan, had remained physically detached from the tactical situation, and had failed to effectively modify his own operational plan to exploit any opportunities presented during the fight. Despite these shortcomings, the battle had been an operational victory for the Confederates.

For the Federals, the tactical use and exploitation of intelligence at McDowell had been the most positive use of intelligence during this phase of operations. Beginning with Banks' inability to properly assess Jackson's general capabilities for offensive action, the Federals had failed in their intelligence effort in the Valley. The lack of coordination between Banks and Fremont, as well as between the various subordinate elements within these commands, had led to a decentralized Union intelligence apparatus that failed to meet any operational needs. Collection assets were never aggressively used to answer operationally significant questions and were handled

piecemeal rather than in an attempt to develop a unified enemy picture. Although Union commanders shared some information regarding the possible movements or disposition of the Confederates, no attempt was ever made towards a combined effort between Banks and Fremont to determine enemy intentions. The efficient use of tactical intelligence by Milroy and Schenck as a force multiplier for their numerically inferior force was an anomaly, rather than a standard, for Union forces during this phase of operations.

Finally, despite the actual performance levels for each side's intelligence, Jackson had clearly recognized the fundamental ability of intelligence to shape an operational commander's planning. This is nowhere clearer than in his use of deception during the westward move towards Staunton. Because Jackson realized the impact that intelligence should have on a commander's planning and of the fundamental way that intelligence could shape the future actions of an enemy commander, the Confederate leader took great pains to falsify Banks' impressions regarding Confederate intentions. By leading Banks to the false conclusion that the Confederates were on their way for a rendezvous in Richmond, when in reality they were headed toward a junction with Johnson, the Southern general had intensified the uncertainty of war into a fog that the Federals were unable to penetrate until it was too late.

THE OPPOSING FORCES AT MCDOWELL⁵⁵³
(TABLE 5A)

The Union Army
(c. 3318 men)

Senior Officer Present - Brig. Gen. Robert C. Schenck

Milroy's Brigade - Brig. Gen. Robert H. Milroy
25th Ohio - Lt. Col. W.P. Richardson
32d Ohio - Lt. Col. Ebenezer H. Swinney
73d Ohio - Col. Orland Smith
75th Ohio - Col. Nathaniel C. McLean
2d West Virginia - Col. John W. Moss
3d West Virginia - Lt. Col. Francis W. Thompson
9th Ohio Battery⁵⁵⁴ - Capt. Henry F. Hyman
12th Ohio Battery - Capt. Aaron C. Johnson
1st West Virginia Cav. (3 Co's) - Maj. John S. Krepps

Schenck's Brigade - Brig. Gen. Robert C. Schenck
55th Ohio - Col. John C. Lee
82d Ohio - Col. James Cantwell
5th West Virginia - Col. John L. Zeigler
1st Battalion Connecticut Cav. - Maj. Judson M. Lyon
11th Ohio Battery - Capt. William L. DeBeck

⁵⁵³Battles and Leaders, Vol. 2, 301.

⁵⁵⁴ All of the numbered Ohio batteries in Fremont's army were subordinate elements of the 1st Ohio Artillery Regiment. Although letter designations for these artillery batteries may be more correct when compared to the official table of organization for the regiment, contemporary sources consistently used number designations (Battery I is the 9th, K is the 11th, L is the 12th).

THE OPPOSING FORCES AT MCDOWELL⁵⁵⁵
(TABLE 5B)

The Confederate Army
(c. 6000 men)

Valley District - Maj. Gen. Thomas J. Jackson

Army of the Valley - Maj. Gen. Thomas J. Jackson

First (Stonewall) Brigade - Brig. Gen. Charles Winder
(NOT BROUGHT TO THE BATTLEFIELD)

Second Brigade - Col. John A. Campbell
21st Virginia - Lt. Col. R.H. Cunningham
42d Virginia - Maj. Henry Lane
48th Virginia - Maj. James C. Campbell
1st Virginia (Irish) Battalion - Capt. B.W. Leigh

Third Brigade - Brig. Gen. William B. Taliaferro
10th Virginia - Col. S.B. Gibbons
23d Virginia - Col. A.G. Taliaferro
37th Virginia - Col. Samuel V. Fulkerson

Army of the Northwest - Brig. Gen. Edward Johnson

First Brigade - Col. Z.T. Conner
12th Georgia - Maj. Willis A. Hawkins
25th Virginia - Col. George H. Smith
31st Virginia - Lt. Col. Alfred H. Jackson

Second Brigade - Col. W.C. Scott
44th Virginia - Maj. Norvell Cobb
52d Virginia - Col. Michael G. Harman
58th Virginia - Lt. Col. F.H. Board

⁵⁵⁵Battles and Leaders, Vol. 2, 299.

**CASUALTIES AT MCDOWELL
(TABLE 6)**

Command	Killed	Union Forces ⁵⁵⁶		Total
		Wounded or Missing	Captured	
Milroy's Brigade	20	177	2	199
Schenck's Brigade	6	50	1	57
TOTAL	26	227	3	256

Command	Killed	Confederate Forces ⁵⁵⁷		Total
		Wounded or Missing	Captured	
Army of the Northwest				
1st Brigade	43	223	-	266
2d Brigade	20	102	-	122
TOTAL	63	325	-	388

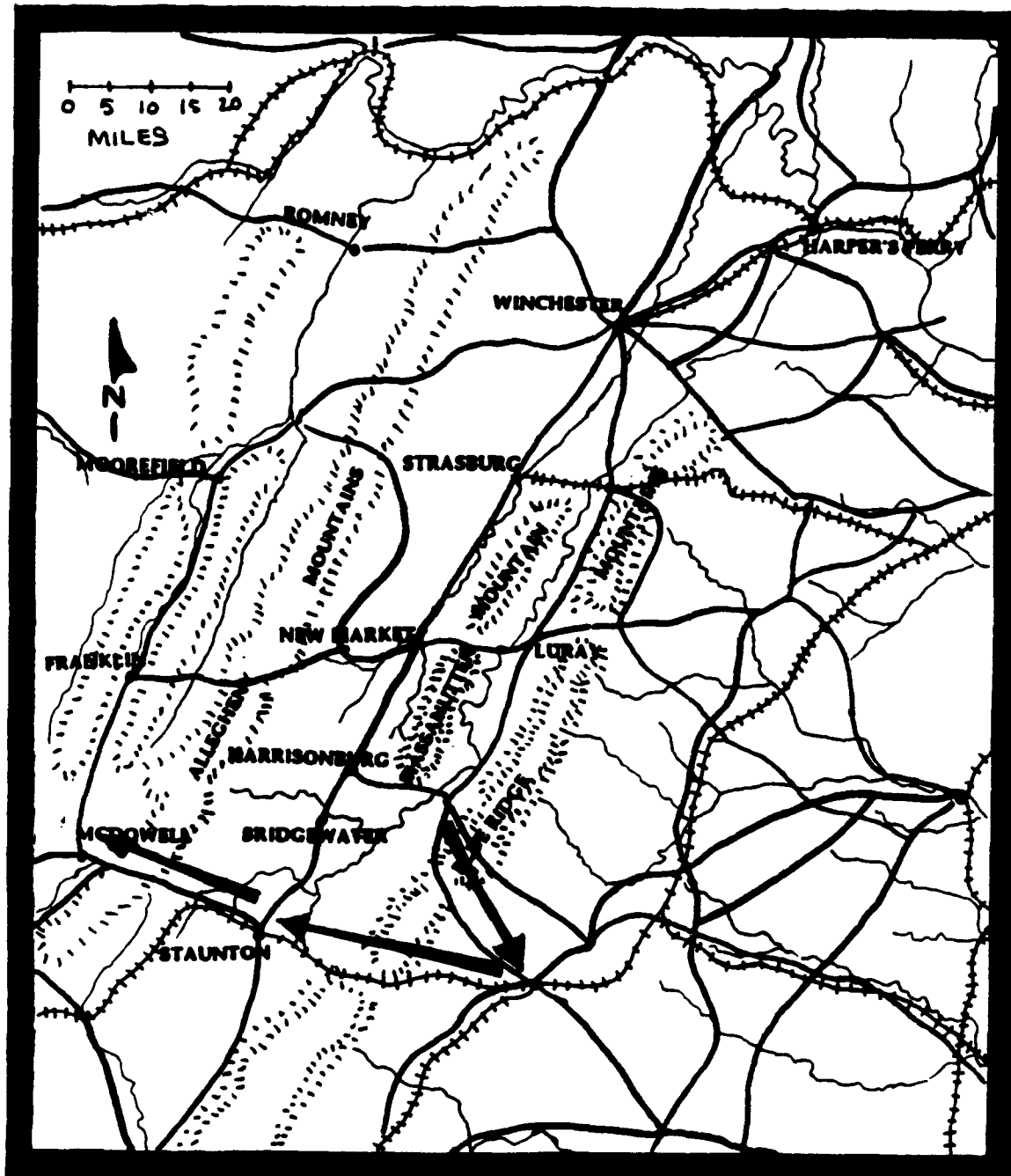
Army of the Valley				
1st Brigade		NOT	ENGAGED	
2d Brigade	-	9	-	9
3d Brigade	12	89	-	101
TOTAL	12	98	-	110

GRAND TOTAL	85	423	-	498
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⁵⁵⁶O.R., Vol. 12, Pt. 1, 462. Official return compiled from nominal lists of casualties.

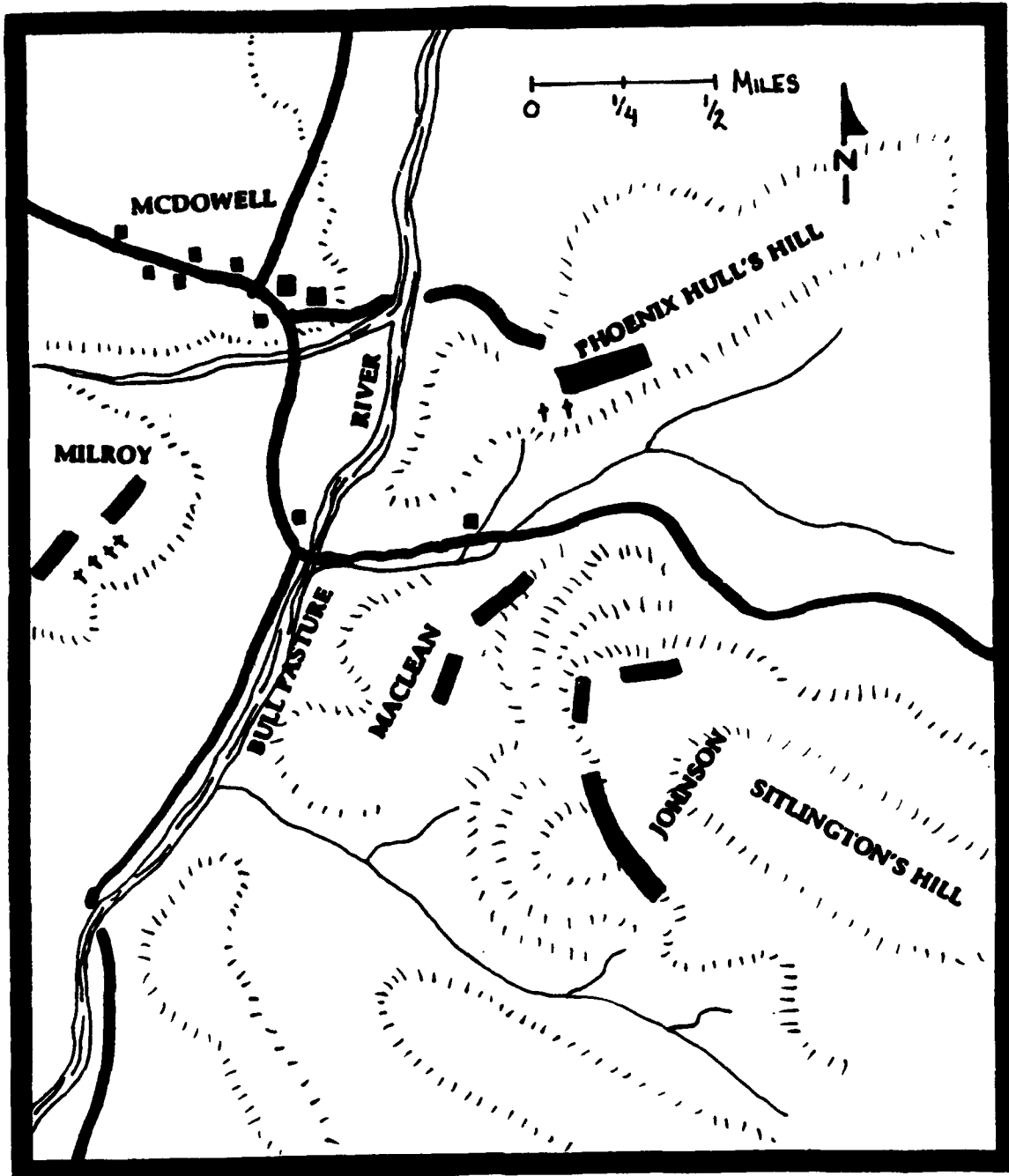
⁵⁵⁷Ibid, 476. This record is based upon a compilation of nominal lists and surgeon reports immediately following the battle.

MAP 8



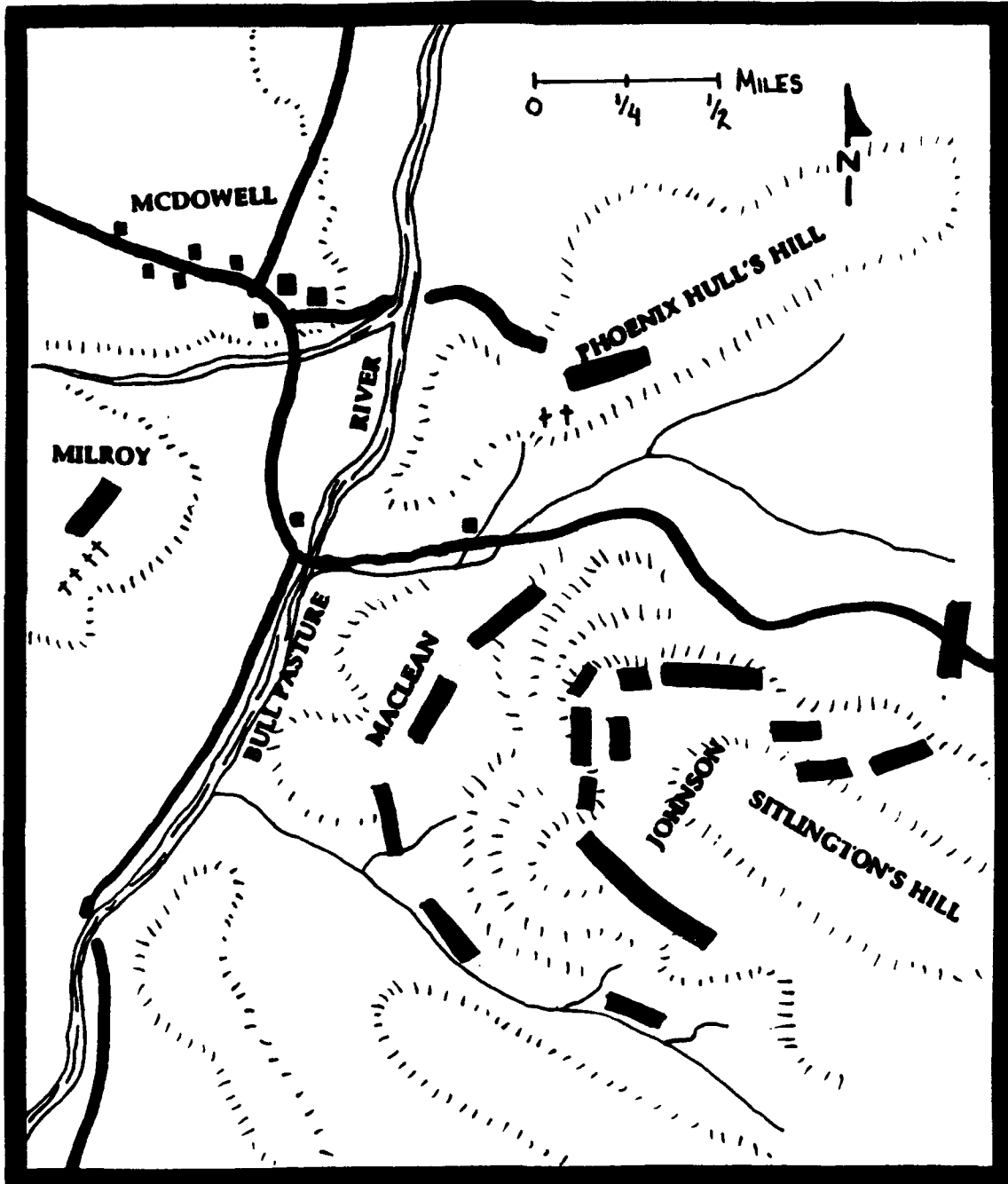
THE CONFEDERATE ADVANCE TO THE TOWN OF MCDOWELL

MAP 9



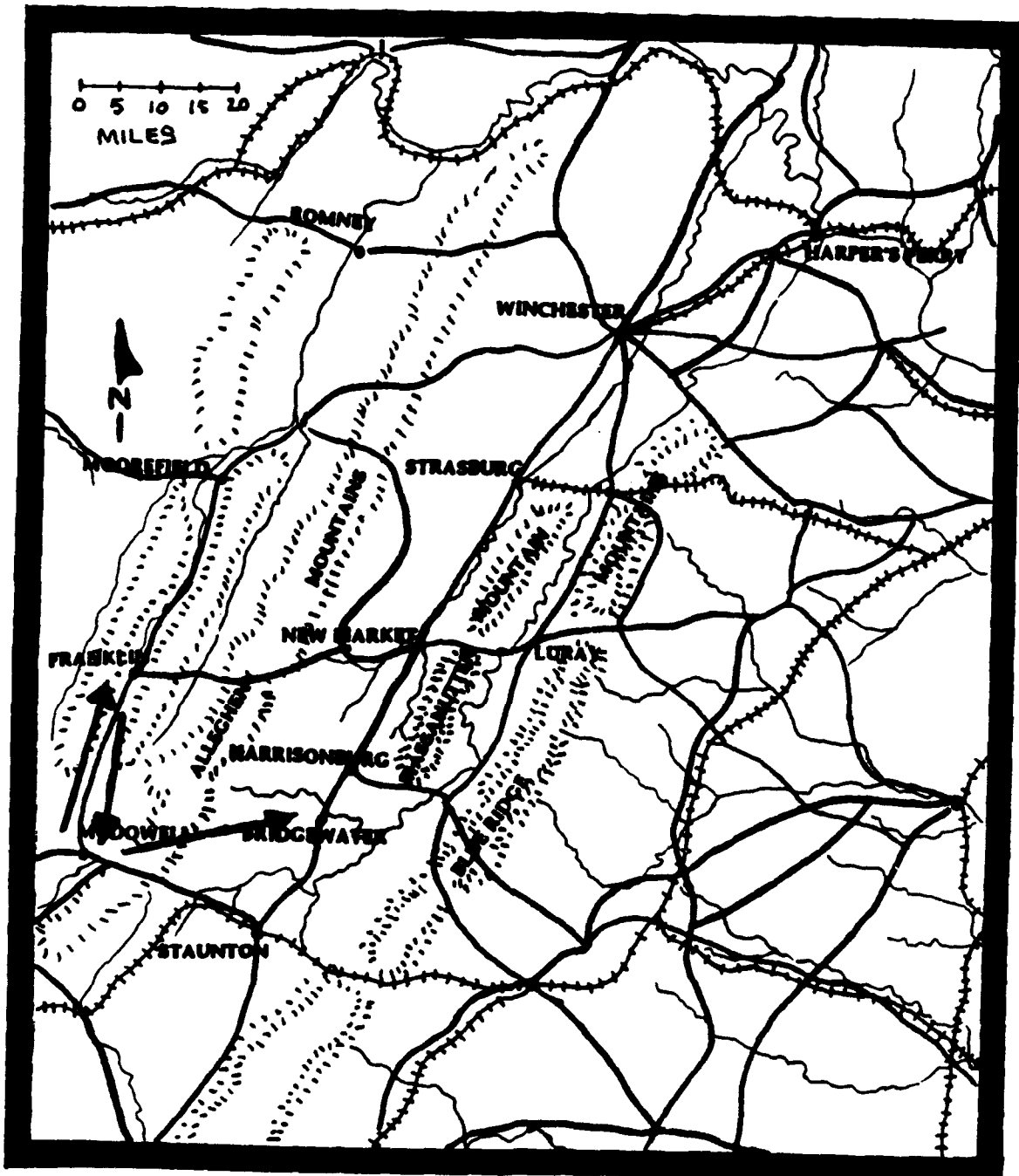
BATTLE OF MCDOWELL: INITIAL POSITIONS

MAP 10



BATTLE OF MCDOWELL: CONFEDERATE REPOSITIONING

MAP 11



THE CONFEDERATE PURSUIT TO FRANKLIN

V. THE MARCH TO THE POTOMAC

A. FRONT ROYAL

Prior to his meeting with Ewell on the 18th, Jackson had accompanied Jedediah Hotchkiss on a reconnaissance of the nearby North River in a search for useable fording points. To begin the next phase of his intended offensive, Jackson would have to move his force to the other side of the river. Although no suitable fords were found, Hotchkiss proposed the construction of a temporary bridge for the dry passage of Confederate infantry and ammunition caissons over the waterway. Large farm wagons, which were plentiful throughout the area, could be driven into the river to serve as temporary supports and wood planking then laid across to form a walkway over the river. The general approved the plan and Hotchkiss began gathering the necessary equipment for the span.

At 3:00 a.m. on the 19th⁵⁵⁸, Jackson's army began its passage over the river. The expedient "...bridge made of planked wagons"⁵⁵⁹ worked remarkably well and the soldiers made the crossing without incident. Despite a rather leisurely pace during that day's march, fair weather and high morale in the Southern ranks allowed for good progress. By evening, the Confederate advance had reached the vicinity of

⁵⁵⁸Hotchkiss, 46.

⁵⁵⁹Worsham, 66.

Dayton and there went into camp for the night (MAP 12).⁵⁶⁰ While the rest of the army was crossing the river, Hotchkiss and Lt. Boswell, Jackson's Chief of Engineers, were dispatched to gain information about the enemy situation to the north.⁵⁶¹ Travelling via the Valley Turnpike and passing through Harrisonburg, the two staff officers went about 36 miles before reaching Col. Ashby in New Market. Ashby reported the main Federal force to be in Strasburg while a large Union outpost and supply depot were located in Front Royal, at the northern end of the Luray Valley. Confederate scouts also reported that Shield's division had crossed the Massanutten, marched to Luray, and then continued on to Front Royal after Banks had abandoned Harrisonburg.⁵⁶² The Federals continued to send patrols to the region south of Strasburg and a detachment of Union cavalry was presently known to be operating along Pugh's Run near Woodstock. Additional information regarding the movement and activities of the Federal forces was also provided to Hotchkiss by some of the local inhabitants who considered themselves roughly handled by the invading Union troops.⁵⁶³

Gen. Banks, commander of the main Federal force in Strasburg, was growing increasingly concerned about the whereabouts of Jackson's army. Gen. Shields'

⁵⁶⁰Hotchkiss, 46.

⁵⁶¹Ibid., 46-47.

⁵⁶²Ibid., 46.

⁵⁶³Ibid., 47. A local citizen named Negg, a pacifist Dunkard farmer, had reported the movement of a Federal division across the Massanutten when Banks had left Harrisonburg.

division had been transferred from the Valley to reinforce Gen. Irvin McDowell's command east of the Blue Ridge, near Fredericksburg. Secretary of War Stanton had also ordered Banks to establish a regimental-sized outpost at Front Royal and this further reduced the number of troops with Banks in Strasburg.⁵⁶⁴ The Union commander now had only Gen. Williams' understrength infantry division and a brigade of cavalry to protect the entire lower Valley (TABLE 7A). By mid-May, Gen. Banks realized that his much reduced Federal command was too small to effectively defend its position at Strasburg.⁵⁶⁵ The Federals would have to maintain a close watch on Confederate forces throughout the Valley to provide warning of any developing threat. Confederate cavalry, however, had formed a near impenetrable screen to the south. Confederate patrols were active around Columbia Furnace and Woodstock⁵⁶⁶ and 300 Southern horsemen had recently been noted within 10 miles of the Federal outpost at Front Royal.⁵⁶⁷ Although some of Col. Ashby's cavalry rejoined Jackson's force at Bridgewater on the 18th, the Confederates still left a sufficient number of mounted troops to the north to continue this screen.⁵⁶⁸

⁵⁶⁴O.R., Vol. 12, Pt. 1, 522. 16 May letter from Stanton to Banks and the latter's reply.

⁵⁶⁵Ibid. 16 May letter from Banks to Stanton.

⁵⁶⁶Ibid. 17 May message from Banks to Stanton.

⁵⁶⁷Ibid., 523. 18 May letter from Banks to Stanton.

⁵⁶⁸Ibid., 701. Jackson's official report of operations during May 1862.

On the afternoon of the 19th, Jackson ordered Ewell to send Brig. Gen. Richard Taylor's brigade of Louisiana troops to New Market the following day.⁵⁶⁹ Taylor was generally familiar with the area around Ewell's camp and immediately began to plan for the movement. Taylor's brigade had been posted

...near a pike leading south of west to Harrisonburg, whence, to gain New Market, the great Valley pike ran due north. All roads near our camp had been examined and sketched, and, among them was a road running northwest over the southern foothills of Massanutten, and joining the Valley pike some distance to the north of Harrisonburg. It was called the Keazletown road, from a little German village on the flank of the Massanutten; and as it was the hypotenuse of the triangle and reported good except at two points, I decided to take it. That night a pioneer party was sent forward to light fires and repair the road for artillery and trains.⁵⁷⁰

Taylor's awareness of the roads and topography in the area was the direct result of an informal intelligence effort designed to increase his understanding and use of the region's geography. In a conscious attempt to increase his own effectiveness as a military leader, the Confederate brigadier had

...early adopted two customs and adhered to them throughout the war. The first was to examine at every halt the adjacent roads and paths, their direction and condition; distances of nearest towns and crossroads; the country, its capacity to furnish supplies as well as general topography, etc., all of which was embodied in a rude sketch, with notes to impress it on memory. The second was to imagine while on the march an enemy before me to be attacked, or to be received in my position, and make the necessary dispositions for either contingency.⁵⁷¹

⁵⁶⁹Freeman 366.

⁵⁷⁰Taylor, 47-48.

⁵⁷¹Ibid., 48.

Armed with this elementary planning and his own broad knowledge of the immediate operating area, Taylor consistently responded to perceived enemy threats and executed orders in an exemplary manner.

On the morning of the 20th, the Confederates resumed their march. While Taylor began the westward movement of his brigade to New Market at "early dawn"⁵⁷², Jackson moved the rest of his army north towards the proposed rendezvous. Ashby's cavalry continued to provide an effective screen in front of the Federal position at Strasburg and thus helped to conceal the Confederate movements.⁵⁷³ So effective was this screen that Gen. Banks remained convinced that Jackson's main force was now 8 miles west of Harrisonburg, a reasonable deduction given the earlier Confederate expedition against Milroy to the west.⁵⁷⁴ Like the previous day, the weather was good and the Southern troops were able to march at a leisurely pace. After passing through Harrisonburg, the Army of the Valley linked up with Taylor's brigade on the Valley pike, south of New Market, and there went into camp for the evening.⁵⁷⁵

While the Confederate troops were marching toward their junction at New Market, Hotchkiss and Boswell continued their reconnaissance activities for Jackson.⁵⁷⁶ The

⁵⁷²Ibid., 48.

⁵⁷³Freeman, 371.

⁵⁷⁴O.R., Vol. 12, Pt. 1, 523. 21 May letter from Banks to Stanton.

⁵⁷⁵Worsham, 66-67.

⁵⁷⁶Hotchkiss, 47. Diary entry for 20 May.

pair travelled to Woodstock where they learned from some of Ashby's scouts that a group of Federals were only 4 miles away at Maurertown. Banks' main body was reported to be entrenching and building field fortifications at Strasburg. Although the Southern cavalymen warned the two staff officers that Union patrols still made frequent trips to the vicinity around Woodstock, the pair now separated to expand their investigation of the area. Boswell went towards the northern end of the Massanutten, in search of a vantage point from which he could observe the Union activities in Strasburg. Hotchkiss, meanwhile, travelled to Myer's Forge via Middle Road to ascertain the presence of any Federal patrols and to determine the general condition of the roads throughout the area. Intelligence provided by these subordinates would allow the Confederate commander to remain intimately aware of his area of operations and any changes in the enemy situation.

The next morning Jackson continued his march. Because of the placement of the previous night's camp, Taylor's brigade led the Confederate column in its northward advance. "After moving a short distance in that direction, the head of the column was turned east and took the road over the Massanutten gap to Luray."⁵⁷⁷ Although Federal cavalry patrols attempted to locate the position of Jackson's force on this day, Ashby's mounted troopers blunted the Federal probe after a brief skirmish in Woodstock.⁵⁷⁸

⁵⁷⁷Taylor, 51.

⁵⁷⁸O.R., Vol. 12, Pt. 1, 523. 21 May message from Banks to Stanton.

After completing its descent of the eastern face of the Massanutten that afternoon, the Southern army continued onward and crossed the east branch of the Shenandoah that night before again going into camp along the river. With typical secrecy, Jackson had withheld his destination and intentions from all subordinates except Gen. Ewell. This sense of secrecy and close hold on information regarding the objective and missions of ongoing operations was probably something of a concern for Gen. Taylor, who remained unacquainted with the commanding general's standard procedures. After two days of marching, Taylor had arrived at a point just a few miles north of Conrad's Store, a distance that might have taken only a few hours if approached by a more direct route. Of Jackson's use of this circuitous route Gen. Taylor wrote, "I began to think that Jackson was an unconscious poet, and, as an ardent lover of nature, desired to give strangers an opportunity to admire the beauties of his Valley."⁵⁷⁹ This march, however, like the trek across the Blue Ridge a couple weeks before, was another attempt to deceive the Federals as to Jackson's true whereabouts and intentions. If Federal collection assets had noted Jackson's northward movements from Harrisonburg or the junction with Taylor's brigade, the Union commander might deduce that a frontal attack against Strasburg's fortifications was developing and would, therefore, concentrate his force to protect the town. Jackson, however, planned to strike the Federals at their weakest point. Later that evening, the Confederate

⁵⁷⁹Taylor, 51.

commander met with Gen. Ewell at a small church near the White House Bridge to discuss their next move.⁵⁸⁰

While Jackson marched his army across the Massanutten on the 21st, trusted subordinates were continuing their own activities to the north, in anticipation of Jackson's arrival. Ashby was still in front of the Federal force at Strasburg acting as an effective screen for Jackson's movements. Hotchkiss continued to make maps of all the available roads in the area around Strasburg and Middletown.⁵⁸¹ After receiving word of a possible enemy advance from Strasburg, Hotchkiss also dispatched a trusted local inhabitant to Middletown to investigate any possible enemy movement in that direction. Noting the obvious intelligence gathering nature of the topographer's actions and the fact that his civilian clothes were blue, several of Ashby's scouts arrested Hotchkiss as a suspected spy. Only when convinced of the staff officer's true identity did the Southern troopers finally release Hotchkiss.

On the 22nd, Ewell's division formed a junction with Jackson's force near Luray.⁵⁸² With the consolidation of the Army of the Northwest, the Army of the Valley, and Ewell's division, Jackson now had about 17,000 troops available for an attack down the Valley (TABLE 7B). The combined Confederate force continued its movement with Ewell's division in the lead.⁵⁸³ By nightfall the advance had reached

⁵⁸⁰Freeman, 373.

⁵⁸¹Hotchkiss, 47.

⁵⁸²Worsham, 68.

⁵⁸³O.R., Vol. 12, Pt. 1, 702. Jackson's report.

to within 10 miles of Front Royal and headquarters was established at Cedar Point.⁵⁸⁴

Confederate reconnaissance activities during the day continued to support Jackson's operational planning. While continuing his watch of the Federals in Strasburg, Ashby had cut off all communications up and down the Valley.⁵⁸⁵ Updated information continued to come in from various civilians in the area and Jedediah Hotchkiss observed the Federal defensive line at Pugh's Run near Fair View.⁵⁸⁶ The Southern commander had used his intelligence assets in the initial planning of the Confederate offensive and continued to make use of current information from various sources to refine his plan.

Jackson's position in the Luray Valley offered several operational advantages to the Confederates.⁵⁸⁷ From this new location, the Confederate commander could easily interpose his own force between Gen. Banks and any of the mountain passes leading to eastern Virginia through the Blue Ridge, thus preventing Banks from reinforcing McDowell in Fredericksburg or McClellan near Richmond. Similarly, Jackson's position could prevent any reinforcements from reaching Banks' isolated command. Second, by crossing the Massanutten, the Southern general had again used the region's geography to screen his own movements from the Federals. With the

⁵⁸⁴Hotchkiss, 48.

⁵⁸⁵Freeman, 372.

⁵⁸⁶Hotchkiss, 48.

⁵⁸⁷Freeman, 374.

protective and masking heights of the Blue Ridge on one side and the Massanutten on the other, Jackson's true whereabouts would remain a mystery to the Federals. Neither Banks nor any of the Union commanders to the east could determine Jackson's position, and thereby hope to deduce his next probable course of action, without first penetrating the Confederate-held mountain barriers. Third, the threat which the Confederates now posed to Banks' flank and rear might cause the Federals to abandon the extensive fortifications they were building in Strasburg and withdraw northward as a means of protecting their lines of communication to Harper's Ferry. Such a movement on the part of the Federals might, in turn, allow the Confederate force to meet Banks in an open battle at an obvious Confederate advantage.

At his headquarters in Strasburg, Banks was still trying to assess the next Confederate move. Information from local inhabitants, prisoners, deserters, and Federal cavalry scouts all confirmed that Jackson had indeed returned to the Valley from his expedition in the Alleghennies⁵⁸⁸ but little else was known for certain. The Federal commander firmly believed, though, that Jackson now contemplated an attack on Strasburg. Banks judged that Jackson's previously illustrated determination, combativeness, and sense of maneuver were key indications that the Confederate commander would continue his offensive against Union forces throughout the Valley. Further, after noting the relatively small size of his own Federal force, the still incomplete fortifications at Strasburg, and the operational significance of Strasburg's geographic position in relation to Union protection of the Baltimore and Ohio

⁵⁸⁸O.R., Vol. 12, Pt. 1, 525. 22 May letter from Banks to Stanton.

Railroad, Banks concluded that "Our situation certainly invites attack in the strongest manner."

At dawn on 23 May, Jackson resumed his advance towards Front Royal.⁵⁸⁹ Although the Confederate commander knew that he had a superiority of numbers over the isolated Federal force in the town, Jackson also understood that he would still need to make good use of the terrain to maximize his offensive power. After travelling up the Luray Valley Road several miles, the Confederate column diverged to the right along a less travelled path.⁵⁹⁰ To avoid direct observation by Federal pickets and to minimize the possible effects of the Union artillery known to be in the town, Jackson decided to use the Gooney Manor Road, a narrow and winding dirt road which ran along the hillsides, as the main route of approach. Two major objectives of the Confederate attack would be the complete capture or destruction of all the enemy forces in the town and the destruction of the railway and telegraph lines linking Front Royal to Strasburg.⁵⁹¹ With the 1st Maryland and Taylor's brigade in the lead, followed by the rest of the Confederate infantry, the Southerners travelled along this road which "...led north between the east bank of the river and the western bank of the Blue Ridge."⁵⁹² While the Southern infantry advanced along the east side of the river, Confederate cavalry under Colonels Ashby and Flournoy

⁵⁸⁹Ibid., 702. Jackson.

⁵⁹⁰Ibid.

⁵⁹¹Freeman, 375.

⁵⁹²Taylor, 52.

was proceeding along the west bank towards Buckton. The presence of the mounted Southerners west of Front Royal would help to isolate that Federal outpost from Banks' main body and, by cutting the communications lines leading to Strasburg, it was hoped that word of the Confederate attack might be delayed until a Confederate victory was secured. Other Confederate cavalymen, travelling ahead of the infantry as an advance guard, were able to capture some of the advanced Union infantry pickets several miles south of Front Royal and thereby delayed Federal warning of the upcoming attack.⁵⁹³

The Federal forces in Front Royal could hardly hope to match the might of Jackson's army (TABLES 7A and 7B). Nine companies of the Union 1st Maryland, two companies of the 29th Pennsylvania Volunteers, and 38 artillerymen with two 10-pound Parrot guns formed the entire strength of the Federal outpost.⁵⁹⁴ The aggregate total of the Federal force numbered only about 1063 men compared to Jackson's force of about 17,000. While the rifled Parrot guns made the Federal artillery capable of firing at extended ranges, the infantry's arms were of inferior quality. On the previous day, 22 May, Col. Kenly had written to Gen. Banks that the 1st Maryland was still armed with outdated smoothbore muskets and inquired when new firearms for the regiment might be available.⁵⁹⁵ Kenly had no cavalry attached

⁵⁹³O.R., Vol. 12, Pt. 1, 536. Banks' report.

⁵⁹⁴Ibid., 555. Report of Col. Kenly, commander of the Union 1st Maryland.

⁵⁹⁵Banks MS. 22 May 1863 letter from Col. Kenly, commanding at Front Royal, to Gen. Banks.

to his command and had to rely strictly upon infantry patrols for warning of an enemy's approach.

Sometime between 1:00 and 2:00 p.m., the Southerners came in contact with the Union pickets about 1 and 1/2 miles from the town. Although the Federal troops were able to sound the alarm about the Confederate approach, they quickly fled back toward the town to rejoin their unit. After easily driving in these scattered guards, the head of the Confederate column moved forward at an even quicker pace and soon came in sight of the town.⁵⁹⁶

From his vantage point at the head of the Confederate column, Gen. Taylor soon noted "a young, rather well-looking"⁵⁹⁷ woman hurrying towards the Southerners from the direction of the town. This was Belle Boyd, an inhabitant of Front Royal who was already noted for providing reliable information regarding the movements of Northern troops throughout the area to the Confederates. After regaining her breath, Boyd provided her information quickly and precisely: the main Federal camp was west of the river; the Federal artillery could easily cover the wagon bridge but not the railroad bridge which crossed the river; the Union commanders believed that Jackson's main force was still west of the Massanutten near Harrisonburg; Gen. Banks was reportedly attempting to concentrate his forces at Winchester.⁵⁹⁸

⁵⁹⁶O.R., Vol. 12, Pt. 1, 702. Jackson.

⁵⁹⁷Taylor, 52.

⁵⁹⁸Ibid.

When presented with this information, Jackson decided on an immediate assault against the town. Following instructions from the senior Confederate commander, Taylor quickly deployed some of his troops as skirmishers and began to push toward the town.⁵⁹⁹ The Confederate 1st Maryland and the Louisiana Special Battalion would form the main elements of the Southern assault while Col. Hays' 6th Louisiana would move in support on the left (MAP 13).

After receiving word of the Confederate approach from the Union pickets, the commander of the Federal garrison, Col. Kenly of the Union 1st Maryland, had deployed his troops to meet the threat.⁶⁰⁰ One company of the 1st Maryland was deployed forward as skirmishers south of the town. The remaining companies of the regiment formed near their camp, north of the town and between the two forks of the river, to await the expected Southern assault. The two Union guns also took position near the camp and were especially oriented to provide effective fire against the wagon bridge. The Federal position was somewhat higher than the ground on the east bank and thereby afforded some slight advantage to the Northern troops. The two companies of Pennsylvania infantry were dispatched to guard the single bridge across the North Fork of the river, the only useable route for a Federal retreat.

The Confederate assault columns quickly pushed through the town, driving the few Union skirmishers back towards their camp. As the Southern soldiers cleared the town, Taylor rode ahead of his troops to personally reconnoiter the enemy position

⁵⁹⁹*Ibid.*, 53.

⁶⁰⁰O.R., Vol. 12, Pt. 1, 556. Kenly's battle report.

and to examine possible crossing sites over the river.⁶⁰¹ Although Federal infantry and artillery opened fire on the Confederate brigadier as he neared the river's edge, Taylor successfully completed his survey and reported his findings to Jackson. The Union position was well situated between the two forks and, because recent rains had swollen the river, the two bridges offered the only axes of assault against the Federals. The placement of the Federal artillery would make an open crossing costly for the Confederates. Faced with this situation Jackson now considered bringing some of his own artillery to bear against the Union guns. Because Southern smoothbore artillery could be too easily outranged by the Federal 10-pound Parrots, the Confederates would have to use rifled pieces for effective counter-battery fire. Upon further investigation, however, Jackson found that all of his rifled pieces were far back in the Confederate column and could not be brought to the front quickly along the narrow route of the Gooney Manor Road. Col. Crutchfield, Jackson's Chief of Artillery, had only recently been appointed to his staff position and still had much to learn regarding the proper placement of the artillery during an offensive march.⁶⁰² Instead, the Confederates would have to use unsupported infantry if they hoped to maintain the tempo of the attack.

Taylor's Louisiana brigade would continue as the main Confederate effort because of its forward position along the river. On the Confederate right, the soldiers of Col.

⁶⁰¹Taylor, 53.

⁶⁰²Jackson Letters, 228. Jackson's previous Chief of Artillery had been relieved from duty on 16 May for drunkenness and insubordination. Crutchfield would, therefore, have assumed his post sometime between the 16th and 23rd.

Kelly's 8th Louisiana rushed towards the railway bridge and carefully ran across the cross-ties to secure a foothold on the opposite bank. Observing Kelly's success on the right, Taylor ordered the rest of his brigade to seize the wagon bridge which the Federals were now attempting to burn. While some of the Southern troops attempted to extinguish the flames, others simply rushed headlong into the smoke and dashed across the span. Among the first to cross were both Taylor and Jackson who then continued to direct the Confederate units in their attack against the Federal position.⁶⁰³ After forming a thin line-of-battle on the west bank to skirmish with the Union force, the Southern troops put out the fire at the wagon bridge and completed the crossing of Taylor's brigade.

Although Kenly's small Federal command had done remarkably well in delaying the Confederate advance, the situation was becoming increasingly dangerous for the Northern detachment. The size of the Confederate force to their front continued to grow as more of Jackson's units arrived on the scene. Two companies of the 5th New York Cavalry had arrived at Front Royal at around 3:00 p.m. but these Federal units brought Kenly little additional firepower to resist the Southern onslaught. At around 4:30 p.m. the Union commander received a report that Southern cavalymen were now moving towards the North Fork bridge in his rear. With this information also came the startling news that the Pennsylvania troops were withdrawing northward from the bridge on orders from the senior officer present there.⁶⁰⁴ Faced with the increasing

⁶⁰³Taylor, 53.

⁶⁰⁴O.R., Vol. 12, Pt. 1, 556. Kenly.

pressure to his front and the threat to his line of retreat, Kenly ordered his command to the opposite bank of the North Fork and attempted to hold a position on Guard Hill. By 6:00 p.m., Kenly realized the relative hopelessness of his position. His command had held up the advance of the overwhelming Confederate force for over four hours but no relief was in sight. The site on Guard Hill was a good position but Kenly had too few men and artillery pieces to adequately continue his defense. The Federal commander now prepared to withdraw farther north, this time in the hope of reaching the road to Middletown and perhaps linking up with any Union reinforcements that might be on the way. The two artillery pieces and the cavalry were dispatched first and then the Federal infantry followed (MAP 14).⁶⁰⁵

Faced with the sight of the fleeing enemy, Jackson again lamented the absence of his rifled artillery pieces. While Confederate infantry could only move at about the same pace as the retreating Federals, artillery could have destroyed the closed enemy formations from a distance. At this moment, however, Col. Flournoy arrived near Jackson with four companies of the 6th Virginia Cavalry.⁶⁰⁶ Cavalry, rather than artillery, would have to deliver the crushing blow against the Federals. Jackson ordered Flournoy to pursue immediately then accompanied the group of mounted troops himself. The infantrymen of Col. Bradley Johnson's Confederate 1st Maryland followed the cavalry as quickly as they could. About 2 miles north of the bridge, near the town of Cedarville, the Confederates caught up to the fleeing Federals. Although

⁶⁰⁵Ibid., 557. Kenly.

⁶⁰⁶Ibid., 702. Jackson's battle report.

Kenly attempted to form his remaining troops into an effective defense in an open field along the road, fatigue and the diminished size of his command limited his capability to do so. One charge by Flournoy's troopers served to break the Union formation and cause confusion throughout the Federal position. A second charge by the Confederate horsemen and the arrival of Johnson's infantry regiment put an end to Federal resistance. Although a few fugitives of the Federal artillery and cavalry managed to make good their escape, the majority of the Federal command was forced to surrender to the Confederate 1st Maryland.

While Jackson's main force had been engaged at Front Royal, Ashby had skirmished with a small Union detachment near Buckton. The Confederate horsemen had easily dispersed the Federal troops and cut the telegraph lines leading to Strasburg but the action was not without cost. Three of the Confederate cavalry commander's most competent subordinates, Captains Baxter, Fletcher, and Sheetz, "Ashby's right hand"⁶⁰⁷, were killed in the brief clash.⁶⁰⁸ Although Ashby's command had long been noted for its general lack of discipline, these subordinate officers had consistently met all challenges of leadership and had proven themselves to be reliable collectors of information regarding the location and movement of enemy forces. Their loss would seriously diminish the performance of the Southern cavalry in the days upcoming.

⁶⁰⁷Worsham, 69.

⁶⁰⁸Hotchkiss, 48.

The defeat of the Federal outpost at Front Royal was complete, although Jackson was disappointed that the lack of rifled artillery had caused such a delay in the successful execution of the task. The Southern commander could now turn his full attention toward Banks' main force. That night, Jackson initiated some actions to furnish notice of any Federal movement from Strasburg. All the roads leading from Cedarville were patrolled by mounted Confederate scouts to provide warning of any eastward movement by the Union troops.⁶⁰⁹ A few of Ashby's men were sent towards Middletown and Strasburg to observe and harass Banks' main body.⁶¹⁰ Other Southern horsemen were sent towards Winchester to maintain a watch over that area. The remainder of the army was then brought forward and placed into camp near Cedarville for the planned continuation of the offensive the following morning.

Jackson's intelligence effort during the attack against Front Royal had been capably handled. Although the numerical superiority of the Confederate force would have almost guaranteed a Confederate victory over the isolated Federal outpost, Jackson's use of intelligence throughout the advance and during the battle itself helped to optimize the execution of the operation.

The Confederate commander's personal involvement in the direction of the intelligence effort ensured that all collection efforts were focused toward the fulfillment of operationally significant requirements and that essential pieces of information were collected to support operational plans. Ashby's cavalry had reported

⁶⁰⁹Freeman, 382.

⁶¹⁰O.R., Vol. 12, Pt. 1, 703. Jackson.

the general locations and dispositions of the Federal forces, thereby providing Jackson with the initial foundation for his plan to attack Kenly's small Federal force. Subsequent reporting by staff officers and the cavalry, initiated on Jackson's orders, had updated this information and allowed for the continued refinement or confirmation of existing plans. Jackson's use of Hotchkiss' maps and reconnaissance reports had allowed the Confederate commander to use the physical features of the area of operations to his own advantage and aided Jackson in understanding probable Federal intentions with regard to their defense of the lower Valley.

Jackson's intelligence regarding the area of operations had also supported his efforts at operational security and deception. Understanding the influence that intelligence had on his own perceptions of the operational picture, the Confederate commander sought to deny enemy access to or distort the information reaching Federal commanders. In conjunction with the effective cavalry screen formed by Ashby's command, Jackson's use of the terrain to mask his movements and the deceptive routes of his advance helped to confuse Banks as to Confederates' next course of action.

Finally, Jackson's position with the leading elements of the Confederate force allowed him to rapidly assess and act upon key pieces of information as the tactical situation became more fully developed. The Confederate general's quick access to Belle Boyd's information led to the speedy decision to launch an immediate assault against Kenly's command. A lengthy delay in the initiation of this attack might have allowed the Federals to successfully retreat or to receive reinforcements. Jackson's

access to and ready use of the information provided by Gen. Taylor's reconnaissance of the river crossings had allowed the Confederates to continue their attack before the bridges were destroyed. This forward presence had also allowed Jackson to capitalize on the indications of the Federal retreat by committing Flournoy's cavalry to the pursuit and thereby completing the Southern tactical victory.

B. WINCHESTER

At 6:00 a.m. on the morning of the 24th, Jackson resumed his operations against Banks.⁶¹¹ The Confederate commander knew that his own force outnumbered Banks' and he wanted to destroy the Federal command before it had the opportunity to escape or be reinforced. Because Jackson was still unsure about Banks' true location, however, the Confederates would divide their force to locate and engage the Federals (MAP 15). Ashby would proceed to Middletown while Ewell's two cavalry regiments, the 2nd Virginia and 6th Virginia, now assigned to Gen. Steuart, would move toward Newtown. In addition to the cavalry forces sent to locate the Federals, Jackson also dispatched Jedediah Hotchkiss with specific instructions to find Banks and report the Federal positions back to Jackson every half hour via mounted courier.⁶¹² Ewell would advance north from Cedarville, along the Winchester road, in the hope of cutting the Federal line of retreat. Jackson, with his own division and

⁶¹¹Ibid., 779. Ewell's battle report.

⁶¹²Hotchkiss, 48.

Elzey's and Taylor's brigades attached, would move west towards Middletown to attack the Union force wherever he might find it.⁶¹³

At Federal headquarters, Gen. Banks first became aware of the Confederate attack on Front Royal through several telegraph messages which related various bits and pieces of the action. Initial reports from Front Royal state that Col. Kenly and all the other senior officers of the 1st Maryland had been killed, that the regiment had been "...cut all to pieces....", and that the size of the Confederate force was between 15,000 and 20,000 men.⁶¹⁴ Capt. E.L. Hubbard, commanding the Federal guard at the bridge several miles east of Strasburg, reported that his position had been attacked around 4:00 p.m. by Confederate cavalry. Although Hubbard had retained control of the span, he requested reinforcements before any Southern attacks were renewed.⁶¹⁵ In the wake of these reports, several infantry regiments were ordered to prepare for a movement toward Front Royal to reinforce Kenly and to block any further Confederate advance towards Strasburg.⁶¹⁶

Banks still needed more information about this obvious enemy threat before he could efficiently plan his own next course of action. To Gen. Williams, the division commander, Banks wrote that "For the purpose of gaining information of the enemy

⁶¹³Ibid.

⁶¹⁴Banks MS. 23 May United States Military Telegraph from Lt Saville, commanding Company B, 1st Maryland, to Gen. Banks. Also found in O.R., Vol. 12, Pt. 1, 525.

⁶¹⁵Ibid. Copy of 7:00 p.m., 23 May message from Capt Hubbard to Gen. Banks.

⁶¹⁶O.R., Vol. 12, Pt. 1, 545. Banks.

it is desirable that the commanding officer should throw out a small party and scouts on the Front Royal road.⁶¹⁷ When news of a strong Confederate presence along this route was reported back to Banks, the intended reinforcements were quickly recalled to Strasburg. Reconnaissance patrols were dispatched to all roads leading from Strasburg toward Middletown, Newtown, and Winchester but Confederate cavalry patrols were also discovered covering each of these routes.⁶¹⁸

If the Federals remained in Strasburg, they would surely be surrounded by the superior Confederate force. Gen. Banks now believed he had three options available to avoid almost certain defeat at the hands of Jackson's army: "First, a retreat across Little North Mountain to the Potomac River on the west; second, an attack upon the enemy's flank on the Front Royal road; third, a rapid movement direct upon Winchester...."⁶¹⁹ A westward movement would take the Federals away from the Confederate threat and toward a possible junction with Fremont but would also involve the abandonment of the entire Union supply train. An attack against the Confederate left flank offered a chance to surprise Jackson's army and possibly continue an eastward move across the Blue Ridge. This option was also the most dangerous, however, since it involved an attack against a vastly superior enemy force. A retreat toward Winchester would allow the Union troops to keep their lines of

⁶¹⁷Banks MS.

⁶¹⁸O.R., Vol. 12, Pt. 1, 546. Banks.

⁶¹⁹Ibid.

communication to the north open but also allowed for a possible intercept by Confederate forces along the way.

Banks concluded that his best option was to retreat towards Winchester. In a letter to President Lincoln, the Union general stated that, upon "...learning from a great variety of sources that the force at Front Royal was endeavoring to get possession of the road between Strasburg and Winchester...in order to cut off our retreat and prevent reinforcements, I concluded the safest course for my command was to anticipate the enemy in the occupation of Winchester."⁶²⁰ This northward retreat could also allow Banks to unite with any reinforcements that might be sent to his aid from Harper's Ferry or would allow for a continued retreat across the Potomac if the Confederates pressed the pursuit. While the Federal infantrymen readied themselves for the march, other Union assets prepared to provide some warning of the Confederates' approach. Lt. Rowley of the Signal Corps established signalling stations along the proposed route of march to report any indications of an enemy advance and to allow for better control of the Federal units during movement.⁶²¹ Union cavalry scouts continued to patrol the roads leading to Front Royal and other points east of Strasburg.

At 9:00 a.m. on the 24th, the Federal column got under way. Because the Union commander expected the greatest threat to be coming from behind once his units

⁶²⁰Banks MS. 24 May letter from Banks to Lincoln.

⁶²¹O.R., Vol. 12, Pt. 1, 567. Rowley.

began their movement, the baggage wagons led the line of march.⁶²² Williams' division followed closely behind. Donnelly's brigade led the infantry, followed by Gordon's brigade. Hatch's cavalry brigade and several unattached units acted as the rear guard of the Federal column. In the hope of delaying the Confederate pursuit, Banks had also issued orders for Capt. Abert of the Topographic Engineers to burn the bridge over Cedar Creek as soon as the last Federal units had passed.

The Federal column made little progress before it was intercepted by the Southerners. About 3 miles north of Strasburg, the Federal wagons were attacked by Confederate cavalry.⁶²³ Ashby's men had observed all of the Federal preparations and had sought an easy target in this first strike against the Union procession. Although the Southern attacking force was relatively small, the clash threw the Federal column into confusion and temporarily halted the retrograde. Some Northern teamsters panicked at news of the Confederate attack and wagons scattered in various directions, often becoming easier targets for capture in the process. A soldier of the 5th Connecticut, serving with the quartermasters, reported that his wagon was "...stopped by some cavalry who said the rebels were just ahead so we turned around and run back about a mile...."⁶²⁴ Donnelly's infantry brigade was ordered forward to reopen the route of retreat but the confusion in the baggage train hampered this effort. One Federal soldier wrote that "The report was brought back that the advance

⁶²²Ibid., 547. Banks.

⁶²³Ibid.

⁶²⁴Rufus Mead, Manuscript. Diaries, 1861-1865. Manuscript Division, Library of Congress, Washington, D.C.

of our train had been fired into by a large force of rebel cavalry, but no one could tell where the cavalry was posted, nor the probable number...." of the Confederate attackers.⁶²⁵ The few Confederate horsemen within sight, however, were soon driven off by the line of Federal infantry and the column continued its retrograde. The remaining wagons of the Federal baggage train now travelled in the rear near Hatch's cavalry.

While on the march, Banks received confirmation that the Confederates were indeed trying to cut off his line of retreat to the north. Captains Lane and Richardson, along with 11 other men of the 29th Pennsylvania, had escaped capture at Front Royal and now reported their observations.⁶²⁶ 6,000-10,000 Confederates were believed to be moving north on the Front Royal-Winchester road with the object of reaching the latter place in advance of the Federals. Now that he had opted for the northward retreat, Banks had to reach Winchester before Jackson if he was to retain any hope for his command's survival.

Although Ashby's cavalry had successfully reached the turnpike to harass the Federal movement, Jackson's main column had yet to arrive. While the Confederate commander had ordered some of his subordinates to begin their movement earlier in the morning, Jackson had apparently delayed his own start of the 7-mile march from Cedarville to Middletown. About 4 miles east of Middletown the advancing Confederates were met by a Federal cavalry patrol consisting of elements of the 1st

⁶²⁵Boyce MS.

⁶²⁶Banks MS. 24 May message by Capt. Collis to Gen. Banks.

Maine and 1st Vermont.⁶²⁷ After brushing aside this Union detachment, the Confederates drove onward. Several subsequent skirmishes and Jackson's unfamiliarity with the road over which he now travelled, however, served to slow the Confederate advance. Despite Hotchkiss' extensive mapping efforts in the area, the region through which Jackson now passed was marked "Unexplored" on the Valley map.⁶²⁸

With Maj. Wheat's Louisiana Special Battalion and the Rockbridge Artillery to accompany him, Jackson now assumed the lead in the Confederate column and soon outdistanced the rest of the Southern force.⁶²⁹ With this small advance party, the Confederate commander, sometime during the mid-afternoon,⁶³⁰ struck the "...pike at Middletown, twelve miles south of Winchester, along which a large body of Federal horse, with many wagons was hastening north."⁶³¹ Jackson was initially unsure whether he had intercepted the front or rear of the Union column. After a quick questioning of some local inhabitants, the Confederate commander determined that most of the Federals had already passed Middletown.⁶³²

⁶²⁷Freeman, 385.

⁶²⁸Hotchkiss Map, H-39. Also noted in Freeman, 474.

⁶²⁹Taylor, 56.

⁶³⁰Freeman 386.

⁶³¹Taylor, 56.

⁶³²Freeman, 386.

Although he had failed to intercept the head of the retreating Federal force, Jackson decided to inflict what damage he could on the enemy at hand. Maj. Wheat's Louisiana Tigers "...attacked at once and cut their marching column in two..."⁶³³ The Parrot guns of the Rockbridge Artillery bombarded the crowded turnpike and sent the Union troops fleeing. While the Federal units north of the Confederate position continued their retreat, those units to the south realized that they were cut off and prepared for a fight. This small Union force consisted of six companies of the 5th New York Cavalry, five companies of the 1st Vermont Cavalry, Collis' Zouave infantry company, and Hampton's Battery of four 10-pound Parrot guns.⁶³⁴ After forming a hasty defensive position south of Cedar Creek, the Federals opened fire on Jackson's advance. Capt. Abert, the Topographic Engineer, also attempted to burn the bridge across Cedar Creek to prevent any further Confederate attack against the isolated detachment.⁶³⁵ Although Jackson had perhaps been more interested in continuing his pursuit of the main enemy body to the north, the opening of the Union artillery prompted an immediate Confederate response. Jackson now ordered three of his five available brigades, Taylor's, Winder's and Campbell's, to engage the Federal force south of Middletown.⁶³⁶

⁶³³Worsham, 70.

⁶³⁴Freeman, 389.

⁶³⁵O.R., Vol. 12, Pt. 1, 547. Banks.

⁶³⁶Ibid., 703. Jackson.

Although the Federal detachment had remained organized and established a good position after the opening Confederate attack, the obvious superiority of the now advancing Southerners led the Union commander to consider a hasty withdrawal. Capt. Abert had discovered that burning the bridge over Cedar Creek would be a wasted effort since there were numerous fording sites nearby which would allow the Confederates to continue their advance.⁶³⁷ The Confederate lines overlapped both flanks of the Federal position, thereby allowing for probable envelopment if the Federals stayed in their present position. At around 7:00 p.m., the Union troops began an organized retreat from their position and moved along a road leading westward.⁶³⁸ In turn, the Southerners abandoned their attack at Cedar Creek and returned north to continue the pursuit of Banks' main body.⁶³⁹ The separated Union force eventually made its way safely north and crossed the Potomac into Maryland on the 25th.

Although darkness was beginning to fall, Jackson decided to continue the pursuit of the main Federal column towards Winchester. Any delays might allow the Union troops to erect defensive works or to escape across the Potomac. Cavalry would have been the ideal arm to use in this pursuit of the retreating enemy but no mounted troops were at hand. Following the initial attack against the Union baggage train, Ashby's troopers had become so engrossed in looting the scattered Federal supply

⁶³⁷Ibid., 569.

⁶³⁸Freeman, 392.

⁶³⁹Worsham, 70.

wagons that few, if any, soldiers of that command were now available for action. The loss of Ashby's three subordinates on the previous day had contributed to a corresponding loss in leadership and discipline during the present situation. Jackson would have to rely on the strength and speed of the Southern infantrymen to continue his pursuit of Banks. To remain abreast of the latest tactical developments and to position himself where he could best influence the course of the ensuing operations, Jackson again placed himself with the point of the Southern advance.⁶⁴⁰

As the Confederates passed through Newtown along the turnpike, they were ambushed by the 2nd Massachusetts, one of three infantry regiments that Gen. Williams had detached as rear guards for the retreating Federal column.⁶⁴¹ From his position with the Confederate vanguard, Jackson quickly ordered the 33rd Virginia to counterattack and the Union unit was forced to resume its retreat.⁶⁴² At Bartonsville the Southerners were again ambushed by a Federal rear guard unit firing from the protective cover of a stone wall bordering the turnpike. Although the Northern troops were easily driven away, these ambushes helped to harass and delay the Southern advance. The Confederate commander was now forced to dispatch reconnaissance patrols and flanking columns to investigate potential traps along the line of march.

⁶⁴⁰Taylor, 58.

⁶⁴¹O.R., Vol. 12, Pt. 1, 595. Gen. Williams had also detached the 27th Indiana and 28th New York for this duty.

⁶⁴²Ibid., 704. Jackson.

Jackson pushed his command onward until around 1:00 a.m. when he finally allowed his weary troops a brief rest.⁶⁴³ While his men slept, the Confederate commander maintained a solitary watch along the road.⁶⁴⁴ Sometime after 3:00 a.m. Jackson roused his men and again resumed the march. The Confederate general now ordered two companies of the 5th Virginia, men who had lived in Winchester, and one company of the 2nd Virginia, whose members were familiar with the terrain leading to the town, to assume the point position in the advance. Their familiarity with the local area would allow them to suspect potential areas of ambush and to reconnoiter these positions in advance of the main Confederate body.⁶⁴⁵

While Jackson's column toiled along the Valley Turnpike, Ewell's force, consisting of Trimble's and Scott's brigades, the 1st Maryland, and two artillery batteries, had taken a much more direct route towards Winchester. Although Jackson had temporarily halted his subordinate's movement during the skirmish at Middletown, Ewell was permitted to resume his march at around 5:45 p.m.⁶⁴⁶ By 10:00 p.m., Ewell's force was within 3 miles of Winchester and went into bivouac for the night.⁶⁴⁷ Pickets were established to maintain a watch toward the town and to look for Jackson's arrival. Ewell would be ready for action at the first hint of daylight.

⁶⁴³Freeman, 393.

⁶⁴⁴Dabney, 375.

⁶⁴⁵O.R., Vol. 12, Pt. 1, 704. Jackson.

⁶⁴⁶Freeman, 388.

⁶⁴⁷O.R., Vol. 12, Pt. 1, 704. Jackson.

From his new headquarters in Winchester, Banks sent a telegraph message to Secretary of War Stanton in Washington⁶⁴⁸ in which he stated that he fully expected a Confederate attack against his position the following day. Banks also offered the opinion that Ewell was trying to cut off his line of retreat and noted that enemy cavalry had been seen near Winchester earlier on the 24th. Stanton had already ordered three regiments of reinforcements from Baltimore to be sent to Col. Miles' command at Harper's Ferry⁶⁴⁹ Gen. Fremont had been ordered to lead his entire force to Harrisonburg to threaten the Confederate rear.⁶⁵⁰ In another letter to Fremont, President Lincoln had enjoined that officer to move speedily to Banks' aid: "Much--perhaps all--depends on the celerity with which you can execute it."⁶⁵¹ Stanton had also ordered Gen. McDowell, commanding the Union force near Fredericksburg, to suspend his advance towards Richmond and to send 20,000 troops to the Valley.⁶⁵²

In less than two days, Jackson's offensive against Banks had already shattered Federal control of the Shenandoah Valley, stalled the Union's northern advance against Richmond, postponed plans for a push into eastern Kentucky, and caused

⁶⁴⁸Ibid., 527. 8:00 p.m. 24 May message from banks to Stanton.

⁶⁴⁹Ibid., 528. Stanton to Banks.

⁶⁵⁰Abraham Lincoln, The Complete Works of Abraham Lincoln, Vol. 5, ed. by Roy P. Basler (New Brunswick, New Jersey: Rutgers University Press, 1953) 230. 4:00 p.m. telegram from Lincoln to Fremont.

⁶⁵¹Ibid., 231. 7:15 p.m. telegram to Fremont.

⁶⁵²O.R., Vol. 12, Pt. 1, . Also in Freeman, 408.

panic throughout the government in Washington. Over 40,000 Northern troops were being diverted from other important operations to aide Banks' imperiled command. More setbacks for the Union were forthcoming.

The retreating Federals had begun arriving in Winchester shortly after dark and continued to stream in until about 1:00 a.m.⁶⁵³ Following the loss of the 1st Maryland and the scattering of various units on the march from Strasburg, the Union forces in Winchester amounted to only about 3600 infantry, 1500 cavalry, ten rifled Parrot artillery pieces, and six smoothbore brass guns (TABLES 7A and 7B).⁶⁵⁴ During the night, Banks deployed his available forces on a line of low hills just south of the town (MAP 16).⁶⁵⁵ Several companies of Michigan cavalry were positioned on the extreme right of the Federal line to guard against any Confederate flanking movement. The Third Brigade, under Col. George Gordon, held the right wing of the line while the First Brigade, commanded by Col. Dudley Donnelly, was stationed on the left. Between the two infantry brigades, several artillery batteries were massed to cover the main approaches from the south. Signal stations had also been established to link the two wings with the center and to provide competent communications during the expected fight.⁶⁵⁶

⁶⁵³Ibid., 595. Williams.

⁶⁵⁴Ibid., 594. Williams.

⁶⁵⁵Ibid., 596. Williams.

⁶⁵⁶Ibid., 567. Rowley.

Although Gen. Williams had hoped to reconnoiter the suspected Confederate positions early in the morning, the Southerners allowed little time before commencing operations.⁶⁵⁷ At around 4:00 a.m., Ewell opened artillery fire against the Federal positions.⁶⁵⁸ Jackson's column had yet to arrive but Col. Crutchfield had delivered a message to Ewell earlier that morning and was now directing the artillery bombardment. At 5:40 a.m. Ewell committed some of his infantry in an attack from the Confederate right.⁶⁵⁹ The 21st North Carolina and the 21st Georgia were sent forward in an attempt to turn the Federal left.⁶⁶⁰ Despite a heavy fog that had fallen during the night and now obscured much of the battlefield, the Federal commanders could clearly see the approaching Southern regiments and prepared to meet them.⁶⁶¹ As the two Confederate regiments neared the Union line, which had been positioned behind some stone walls to provide cover, the entire firepower of Donnelly's brigade poured into the Confederate ranks. Losses in the Southern units accumulated quickly and progress on the Confederate right was brought to a halt.

Jackson's force had begun to arrive in the vicinity soon after Ewell had opened with his artillery. Up to this point, however, the majority of the Confederate infantry

⁶⁵⁷Ibid., 595. Williams.

⁶⁵⁸Ibid., 549. Banks.

⁶⁵⁹Ibid., 779. Ewell.

⁶⁶⁰Ibid., 704. Jackson.

⁶⁶¹Ibid., 549. Banks.

had remained hidden from view in the wooded terrain on the Confederate left.⁶⁶² Although the Union commanders were aware of a growing Confederate presence, they remained unsure of its size or location. Col. Donnelly, however, soon observed nine Confederate regiments moving toward the Federal right and reported this information to Gen. Williams. The Federal division commander then went to the right wing himself to personally observe the enemy activity.⁶⁶³

Throughout the advance on Winchester, Jackson had been aware of the ridgelines located south and southwest of the town and of their potential importance in any assault.⁶⁶⁴ While control of the ridge immediately south of the town, the one on which the Federals had established their position, might offer some benefits, command of a higher second ridge, 400 yards south of the first, could prove even more important. As Jackson's column approached the town, Confederate scouts had reported this southern ridge unoccupied except for the presence of some Federal skirmishers. The Confederate commander had himself ridden forward to confirm the report.⁶⁶⁵ As the Stonewall Brigade reached Jackson's position, the senior Confederate general pointed to an eminence along this ridge and ordered Brig. Gen. Winder to "...occupy that hill."⁶⁶⁶ Campbell's brigade formed to the left of the

⁶⁶²Ibid., 550. Banks.

⁶⁶³Ibid., 596. Williams.

⁶⁶⁴Freeman, 395.

⁶⁶⁵Worsham, 72.

⁶⁶⁶O.R., Vol. 12, Pt. 1, 736. Winder.

Stonewall Brigade and the nine regiments of these commands advanced up the hill unopposed.⁶⁶⁷

As the Confederate soldiers reached the crest of the ridge, however, they were subjected to an intense fire by Federal artillery and infantry posted "...behind a stone wall that ran entirely across the open field..."⁶⁶⁸ on the opposite height. Because of their position on the far left of the Confederate line, the 27th Virginia and 2nd Virginia were particularly exposed to this fire and were, therefore, moved back to the protective cover of the reverse slope.⁶⁶⁹ By 6:00 a.m. Cutshaw's, Carpenter's, and Poague's batteries were also stationed on the hill to provide counter-battery fire against the Federals.⁶⁷⁰

During these initial deployments and actions, Jackson had remained at the front of his lines. This position allowed him to remain abreast of any changes in the enemy situation and to employ his own force so that it could meet any enemy threats or exploit any vulnerabilities in the enemy deployments. As the fire from the enemy lines increased, the Confederate commander now reconnoitered the opposite ridge. Pressure against the Union position would have to be increased to maintain the Confederates' offensive momentum. Accompanied by Col. Campbell and two regimental commanders, Jackson rode along the forward edge of the Confederate

⁶⁶⁷Worsham, 71.

⁶⁶⁸Ibid., 72.

⁶⁶⁹Freeman, 397.

⁶⁷⁰Ibid., 398.

position and "After satisfying himself as to the location of the enemy, he quietly turned his horse and rode back in a walk."⁶⁷¹ The reconnaissance had led Jackson to decide on his next course of action.

The Southern commander summoned Brig. Gen. Taylor to his side and ordered him to assault the enemy position from the Confederate left. While Taylor also went forward to personally inspect the ground over which his unit would have to advance,⁶⁷² Jackson led the brigade to a suitable staging area from which the attack could be launched.⁶⁷³ As the Louisiana units passed in the rear of Winder's brigade, behind the cover of the hill, Jackson placed the 10th Virginia on the left and the 23rd Virginia on the right of Taylor's formation to strengthen this main effort of the Confederate attack.⁶⁷⁴

At around 7:30 a.m., Taylor moved his brigade into the hollow between the two ridgelines and formed for the assault. Because of the open nature of the ground, Taylor's deployment had undoubtedly been seen by the Federals on the opposing height. As the Southerners advanced up the hill, Federal cavalry charged the Confederate left in the hopes of breaking up the assault formation. A quickly

⁶⁷¹Worsham, 73.

⁶⁷²Taylor, 58.

⁶⁷³Worsham, 72.

⁶⁷⁴Freeman, 400.

organized counterattack by several companies of the 8th Louisiana repelled the Union cavalry and allowed the Confederate foot soldiers to continue their assault.⁶⁷⁵

As the Confederates reached the crest of the hill, the Federals began to give way. The three Southern artillery batteries posted near Winder were demolishing the Federals' stone wall with solid shot and the Confederate infantry poured repeated volleys into the now exposed Union ranks. Taylor's assault was too much for the Northern soldiers to resist. On the Federal far right, the 27th Indiana broke and ran back towards the town.⁶⁷⁶ This in turn exposed the flanks of other Federal regiments on the right and Col. Gordon ordered the Federal right wing to fall back towards the town. Faced with the complete collapse of the right, Gen. Williams now ordered a general withdrawal of the entire Union line. The Federal position had collapsed.

As Jackson noted the wavering within the Union position he ordered an advance by the entire Confederate line.⁶⁷⁷ Taylor quickly formed his brigade into column so that it could pursue through the narrow streets of the town. Winder and Campbell's brigades moved down the ridge on which they had been posted and advanced towards the fleeing Federals. Elzey, who had been held in reserve on the turnpike, moved directly up that thoroughfare towards Winchester. On the right, Ewell also ordered Scott, Trimble, and the 1st Maryland to join the pursuit.

⁶⁷⁵Taylor, 60.

⁶⁷⁶O.R., Vol. 12, Pt. 1, 597. Williams.

⁶⁷⁷Worsham, 73.

Although the Federal units were initially able to retire in an organized manner, the restrictive roads through the town and the lack of directive leadership on the roads north of town soon resulted in a temporary route. The 27th Indiana, the unit which had first fled from the Federal right, reformed behind a stone wall north of town to cover the Union retreat and delay the onrushing Confederates.⁶⁷⁸ Federal cavalry helped to collect the straggling infantry into formations along the road and the retreat toward the Potomac was begun.

Although the Federal troops remained generally unfamiliar with the region's geography and the routes leading toward the Potomac, guides were soon found to help provide direction. Sgt. Anderson, of the 2nd Massachusetts, remembered that "Among our guard was a Lieutenant - belonging to the twenty seventh Indiana who said that he was somewhat acquainted with this part of the country having travelled in it before the war."⁶⁷⁹ The young officer was quickly pressed into service as the group's navigator and the unit commenced its northerly trek. One Federal brigade was aided in its movement when:

A young man, a citizen afterwards better known as the Berckley County spy, came to Col. Donnelly and told him if he continued long in the direction he was moving, he would run into a force of rebels that were waiting for him. He could not tell their numbers but they had two guns in position for raking the road. He then offered his services as a guide, saying he was acquainted with every foot of land between there and the river.⁶⁸⁰

⁶⁷⁸O.R., Vol. 12, Pt. 1, 597. Williams.

⁶⁷⁹Anderson MS. Anderson and some of the other members of this fugitive group were captured by Confederate cavalry before reaching the Potomac.

⁶⁸⁰Boyce MS.

Donnelly's brigade and the other Federal units travelled first in the direction of Martinsburg and then moved along different roads to try and reach the Potomac.

As the Confederate units entered the narrow streets of the town they too became somewhat disorganized and intermixed. Under these circumstances, Jackson could hardly use his infantry as an effective means of pursuit. Although the routed and rapidly fleeing enemy offered a perfect target for cavalry, no Southern horsemen were to be seen. Until some mounted troops could be located, the Confederate commander would have to make the best use he could of artillery and infantry to pursue the defeated Federal soldiers. Jackson ordered all available batteries in pursuit and commanded the infantry to follow in support. The fatigue from the previous days' operations was becoming obvious, though. Although the infantry would pursue "...the enemy about five miles below Winchester..."⁶⁸¹ to the area around Stephenson's Depot, the Federals would still make good their escape.

As the artillery and weary foot soldiers began their pursuit, Jackson dispatched his aide, Lt. Sandie Pendleton, to locate Gen. George Steuart, commanding Ewell's cavalry. Ashby's force, which had seen some light action on the Confederate left, was still disorganized in the wake of the looting on the 24th. In contrast Steuart's regiments were still reasonably fresh, cohesive units.

Pendleton finally located Steuart's unoccupied cavalry about 2 and 1/2 miles east of Winchester and relayed Jackson's orders for pursuit to the brigade commander.

⁶⁸¹Worsham, 73.

Noting that his command was part of Ewell's division, Steuart refused to comply with Jackson's orders unless they were properly routed through Ewell first! Although Pendleton eventually found Ewell and got the shocked division commander's approval, the resulting two hour delay allowed the Federals to get well away. Although Steuart pushed his troopers to within 1/2 mile of Martinsburg, the presence there of large numbers of reorganized Federals led him to halt the pursuit. The Southern cavalry remained in this position south of Martinsburg to watch for any opportunity to renew the contest.

By 2:40 p.m., most of Banks' shattered army had reached Martinsburg.⁶⁸² After a rest of several hours, the Federals divided their force and took different routes toward the Potomac. Col. Donnelly led his brigade toward Dam No. 4 and, using small boats found along the river's edge, ferried his command across the Potomac during the night.⁶⁸³ Banks led the main Federal column on the road to Williamsport. Throughout the night and into the following day the Federals slowly ferried the troops to the Maryland shore while the supply trains and heavy equipment crossed at a shallow ford.⁶⁸⁴

Throughout the advance on Winchester, the Confederate commander had used his intelligence assets to locate the positions of the Federal forces, to assist in determining enemy intentions, and to provide notice of enemy strengths and vulnerabilities.

⁶⁸²O.R., Vol. 12, Pt. 1, 528. 24 May telegram from Banks to Stanton.

⁶⁸³Ibid., 597. Williams.

⁶⁸⁴Ibid., 551. Banks.

Jackson had then incorporated this intelligence into the development and execution of his own flexible operational plans, thereby, providing a realistic assessment of his own courses of action based on the realities of the operational situation.

After his capture of Col. Kenly's command at Cedarville, Jackson had immediately dispatched intelligence assets to locate Banks' main body and had even delayed his own advance on the 24th until some word of the Federals' position had been received. The Confederate commander continued to emphasize this need to monitor Banks' location throughout the drive to Winchester, largely because the destruction of Banks' force was the primary objective of Jackson's attack. Because he had a numerically superior force, Jackson could afford to divide his own army to fix the Federal position and then reconcentrate his army in an attack against the enemy.

With the location of Banks' main body, the determination of federal intentions became much clearer. While Jackson himself may have been concerned that Banks would move westward to link up with Fremont or skirt the Confederate army in a quick eastward dash across the Confederate flank, the sighting of the Federals on the turnpike illustrated their intent to retreat toward Winchester. Once Jackson had determined what the Federal course of action was, he could plan his own operation to foil the chances of Union success.

Again, Jackson's forward position near the unit of main effort contributed to the Confederates' ability to correctly respond to current information and to capitalize on potential opportunities suggested by various reports. The Confederate general's location with the Southern vanguard and associated access to significant tactical

intelligence had allowed him to launch an immediate attack against the Federals at Middletown, press the pursuit towards Winchester, and seize the important ridgeline south of the town. Further, Jackson's presence near the front led him to order Taylor's assault against the Federal right and to order the pursuit of the Federals following the collapse of Col. Gordon's brigade.

C. THREATENING THE POTOMAC

On the 26th, Jackson allowed his command to rest and ordered religious services to be held throughout his command.⁶⁸⁵ The Confederate commander would not, however, let his army remain idle in Winchester for long. Although most of Banks' troops were now safely across the Potomac, the Confederates might still be able to cause additional damage to the Union's war effort. Jackson realized that a continued threat against the Potomac might cause Union commanders to divert additional troops and resources from the east and would thereby relieve some of the pressure against Richmond (MAP 17). Later that same day, Stuart's cavalrymen occupied Martinsburg⁶⁸⁶ and Taylor's Louisiana brigade "...was moved ten miles north on the pike leading by Charlestown to Harper's Ferry."⁶⁸⁷ The following day, Jackson pushed his forces even farther from Winchester. Taylor's brigade was now moved "...some miles east toward the Shenandoah."⁶⁸⁸ A small party of Stuart's

⁶⁸⁵Ibid., 707. Jackson.

⁶⁸⁶Ibid.

⁶⁸⁷Taylor, 63.

⁶⁸⁸Ibid.

Confederate cavalry was also dispatched from Martinsburg and destroyed the Baltimore and Ohio Railroad bridge near the North Mountain Depot.⁶⁸⁹

Jackson's operations were already causing alarm throughout much of the Federal leadership. In Washington, the War Department took over control of all railroads in the North after officials noted that "Intelligence from various quarters leaves no doubt that the enemy in great force are advancing on Washington."⁶⁹⁰ President Lincoln wrote to Gen. McClellan that Jackson's movements appeared to be part of a general northward advance and that McClellan's army might be required to return to Washington for a defense of the capital.⁶⁹¹ Although McClellan replied that the Confederate actions were more likely an attempt to prevent reinforcements from being sent to the Federal army near Richmond, this realization failed to change the need to divert some Union forces toward the Valley.

In eastern Virginia, Gen. Geary reported to both the Federal War Department and Gen. McDowell that Jackson was crossing the Blue Ridge with at least 20,000 men.⁶⁹² Although subsequent reports by other Federal commanders proved Geary's account to be false⁶⁹³, these alarmist reports helped to confuse the intelligence picture and weakened the Union's ability to respond properly.

⁶⁸⁹O.R., Vol. 12, Pt. 1, 730. Report by Col. Munford, commander of the 2nd Virginia Cavalry.

⁶⁹⁰Freeman, 408.

⁶⁹¹Lincoln, 235-236.

⁶⁹²Ibid., 234.

⁶⁹³Freeman, 409.

While Jackson continued his aggressive posturing along the Potomac, Union reinforcements continued their movement toward the Valley. When word of the Confederate attack against Front Royal reached Fremont, many of that general's soldiers had still believed that Jackson's force was still to their own front.⁶⁹⁴ Although President Lincoln, hoping to cut off Jackson's line of retreat, had ordered Fremont to proceed to Harrisonburg, the Union general had instead marched his command to Moorefield.⁶⁹⁵ Fremont had found the roads from Franklin to Harrisonburg still effectively blocked by numerous obstacles and, citing the poor condition of his troops, he had opted for a less demanding route to the Valley. The three infantry regiments that had been dispatched from Baltimore, the 3rd Maryland, 87th Pennsylvania, and 111th Pennsylvania, had arrived at Maryland Heights near Harper's Ferry on the night of the 26th and had been deployed to defend against any possible crossing of the Potomac by Confederate forces.⁶⁹⁶ Brig. Gen. Rufus Saxton had been ordered to Harper's Ferry to assume command of the strengthened Federal forces there and had also arrived on the 26th. McDowell was dispatching Shields' and Ord's infantry divisions and two cavalry brigades, about 23,500 men total, across the Blue Ridge toward Front Royal.⁶⁹⁷

⁶⁹⁴Evans MS.

⁶⁹⁵Lincoln, 243.

⁶⁹⁶James Jenkins Gillete, Manuscript. Papers, 1857-1884. Manuscript Division, library of Congress, Washington, D.C.

⁶⁹⁷Lincoln, 246 and 251. Letters from McDowell to Lincoln, 7:20 p.m., 28 May and 12:30 p.m., 30 May.

Jackson again increased his pressure against the Federals on the 28th. At 5:00 a.m. Brig. Gen. Winder led the Stonewall Brigade from its camp near Winchester towards Charlestown.⁶⁹⁸ Several miles from the town, the Confederate scouts returned to Winder with news that 4,000-5,000 Federals were nearby. After dispatching his aide, Lt. Garnett, to inform Jackson of the enemy location, Winder cautiously continued his advance. Capt. Chew, Ashby's artillery commander, volunteered to lead a small reconnaissance party to determine the location and disposition of the enemy force. After several hours Chew returned with word that about 1500 Northern troops were in line of battle about 3/4 mile beyond the town.

Although this force was roughly the same size as Winder's own, the brigadier decided to attack rather than await the arrival of Confederate reinforcements. After passing through the town, Winder deployed his unit in line of battle and immediately charged the Union position. The Federal force quickly dispersed and fled northward towards Harper's Ferry.

Winder pursued the retreating enemy as far as Halltown before halting his own force. Sizeable Union forces could be seen in positions on Bolivar Heights and any further advance would risk engagement with these well placed enemy units. Seeing little use in remaining at Halltown, Winder returned to Charlestown where Gen. Ewell arrived with reinforcements around sunset.

The following day, 29 May, the Confederates continued their threats against Harper's Ferry. Col. Allen's 2nd Virginia, of the Stonewall Brigade, was sent to

⁶⁹⁸O.R., Vol. 12, Pt. 1, 738. Winder.

occupy Loudon Heights, overlooking the town.⁶⁹⁹ From two friendly sources, Winder learned the general strength of the Union garrison at Harper's Ferry and also discovered the presence of Federal heavy artillery on Maryland Heights.⁷⁰⁰ While the Federal position was too strong for the Confederates to launch a direct assault, occasional shelling of the town by Southern artillery and light skirmishing by the 2nd Virginia helped to harass the Federal troops and remind Gen. Saxton of the continued threat to his post.

Even without the posturing against Harper's Ferry, Union commanders in the area had remained keenly aware of the Confederate presence. The possibility of a continued Confederate offensive across the Potomac had worried Washington officials and field commanders were straining every effort to determine Jackson's intentions. Since the 26th, Banks had maintained a careful watch on the Confederate pickets opposite Williamsport.⁷⁰¹ Although the actions of the Southern pickets appeared to be defensive, information provided by Confederate prisoners and other sources had indicated that Jackson was planning to invade Maryland with up to 25,000 troops.⁷⁰² 2,000 Southern soldiers, probably Steuart's cavalry, were known to be in Martinsburg, a useful assembly area for a further Confederate offensive push toward the

⁶⁹⁹Freeman, 412.

⁷⁰⁰Ibid.

⁷⁰¹O.R., Vol. 12, Pt. 1, 530. 26 May message from Banks to Stanton.

⁷⁰²Ibid., 532. Banks.

Potomac.⁷⁰³ Winder's attack against Charlestown on the 28th and the subsequent occupation of Loudon Heights on the 29th helped to support the picture of an impending attack against Harper's Ferry. On the 29th, Banks had reported to Washington that the Confederate pickets opposite Williamsport were withdrawing.⁷⁰⁴ Were the Confederates massing for an attack? A reconnaissance party from Gen. Saxton's command and information provided by a liberated Union prisoner indicated that the Confederate cavalry was preparing to cross the river and isolate Harper's Ferry in preparation for a larger attack.⁷⁰⁵ By the night of the 29th, the Union field commanders and most officials in Washington clearly believed that the Confederates were preparing for an attack against the Federal position.⁷⁰⁶

Although Jackson may have contemplated a continuation of his offensive across the Potomac, the relatively small size of his command and the ever increasing length of his lines of communication made him realize that such an operation was unrealistic at this time. While the Confederate commander may have been willing to pressure the Federals by maneuvering his forces to various positions around Harper's Ferry and shelling the town from a distance, he was unwilling to pay the cost of a direct attack against the post. Jackson was also aware that Federal reinforcements were on the way. Confederate scouts had reported the movement of troops from McDowell's force

⁷⁰³Ibid., 531. Banks.

⁷⁰⁴Ibid., 533. 2:30 p.m. 29 May telegram from Banks to Stanton.

⁷⁰⁵Ibid., 646. Saxton.

⁷⁰⁶Ibid., 534. 11:30 p.m. 29 May telegram from Stanton to Banks.

and, on the 30th, a civilian informant told the Confederate commander that Gen. Shields' division was marching towards Front Royal and was less than a day's march away.⁷⁰⁷ Confederate scouts had also noted Fremont's approach from the west. If either of these forces, both of which were superior to Jackson's own army, succeeded in getting south of Jackson, the Confederates would be cut off and could be easily defeated. By the morning of the 30th, Jackson had begun preparations to meet this new threat.

During the five days since the battle at Winchester, Jackson's intelligence system had continued to serve him adequately by maintaining a watch over those Federal forces within the area of operations and by watching for the approach of any new threats from outside the region. Subordinate units were pushed forward to maintain a watch on Banks' force across then Potomac and to make contact with Saxton's reinforced command at Harper's Ferry. Reconnaissance patrols had allowed these subordinates to make proper operational decisions in their advance and had also provided important information regarding enemy strengths. As Union forces from outside the Valley began to advance towards Jackson's area of operations, Confederate scouts had provided warning of their approach and allowed Jackson to begin planning his next move.

Jackson's own perceptions on the proper use of intelligence had influenced his operational decision to threaten Harper's Ferry and the Potomac line. By maneuvering his own army to various points along the river and by aggressively posturing for an

⁷⁰⁷Freeman, 412.

attack against Saxton's force, Jackson had hoped that alarmist reports of the Confederate actions would elicit a response by the Federal authorities in Washington. With the diversion of Fremont's and McDowell's forces from their proposed operations, Jackson had achieved a strategic goal of the Confederate operation.

D. INTELLIGENCE DURING THE ADVANCE

Jackson's intelligence effort had perhaps been at its best during the offensive against Banks' command. The Confederate commander had taken a conspicuously active role in the direction, analysis, and use of intelligence throughout this phase of offensive operations and the operation's positive results reflected this involvement. Jackson's emphasis on understanding the area of operations, his personal control over the intelligence effort, and his forward positioning with the main effort all contributed to this superior performance.

Much of the Confederate success had been the result of Jackson's use of the Valley's geography to his own operational advantage. Jackson was only able to make effective use of the area of operations in his plans after he had fully analyzed the physical features of the region. Taylor's march to join Jackson and the subsequent Confederate crossing of the Massanutten helped to conceal the Confederate intent to attack Front Royal and move against Banks' flank. This move could only be undertaken by a commander who fully appreciated the various roads in the area and the obstacle to movement and observation that the Massanutten constituted. The advantages of launching an offensive from the Luray Valley could only be understood after an evaluation of the region's geography with regard to enemy positions both in

and outside the boundaries of the district. Similarly, the various routes selected for the advance on Winchester and the ridgeline chosen for the attack position could only have been appreciated by an operational planner familiar with subtleties that might not be immediately apparent without a detailed study of the terrain.

Jackson's personal control over the intelligence effort was another factor in the success of Confederate intelligence. As the chief operational planner, Jackson used his intelligence assets to optimize his own understanding of the operational picture and to recognize potential threats and opportunities as they developed. Requirements for information and subsequent tasking of intelligence collection assets remained focused on operationally significant concerns because Jackson himself played an active role in the direction of the intelligence effort. The location of Federal forces and the determination of Federal intentions remained the focal point of both Jackson's own operational concerns and the intelligence effort. Ashby's cavalry constantly monitored Federal activities and provided consistent reporting back to Jackson. As gaps in the intelligence picture developed, the Confederate commander tasked staff officers, subordinate units, or other collection assets to gather the information needed in the proper development of his plans. Additionally, because the Confederate general commanded the assets needed for both intelligence collection and combat operations, he successfully balanced the requirements of these functions to ensure that his operational goals were best met.

One of the most significant factors in the Confederates' successful use of intelligence during the advance to the Potomac was the commanding general's

forward position throughout most of the operation. In contrast to Jackson's general detachment from the field of action during the battles at Kernstown and McDowell, this phase of the campaign saw him near the Confederate main effort at almost every pivotal point in the action. Because of this presence with the unit of main effort, Jackson was able to rapidly assess current tactical information in the context of broader, previously provided operational level intelligence and make decisions could optimize Confederate capabilities. Jackson's co-location with Taylor's brigade during the march to Front Royal allowed him to capitalize on the intelligence provided by Belle Boyd and issue orders for an immediate attack against the Federal garrison. Because Jackson alone possessed the authority for ordering a general engagement, any delay in transmitting the information back to some other location and then issuing orders for the attack might have allowed the Federals to escape or be reinforced. The Confederate general's presence with Maj. Wheat's advance guard on the 24th allowed him to determine the true location of the main Federal body and to initiate an immediate attack and pursuit against Banks' column. Jackson's location with the Confederate advance near Winchester allowed him to confirm the absence of Federal troops on the southern ridge and to appropriately order Winder's and Campbell's brigades to occupy that position. Similarly, his personal examination of both the terrain and the strengths of the Federal position during the battle at Winchester had allowed him to assess the relative vulnerability on the Federal right and to exploit this point with the assault by Taylor's brigade.

Although subordinate commanders or staff officers may have performed similar functions of observation or information gathering for the commander, only Jackson, as the Confederate operational commander, possessed the necessary authority and assets to exploit these opportunities. Based on current but perishable tactical information, Jackson could seek to cut losses in one area or reinforce success in another part of the line. By placing himself in the position where he could best assess the current operational situation and positively influence the course of the battle, Jackson had shortened the time lag between the collection, assessment, and use of intelligence in the decision making process.

The Opposing Forces at Front Royal and Winchester⁷⁰⁸
(TABLE 7A)

The Union Army

(c. 5300 men at Winchester, 1163 men at Front Royal)

Maj. Gen. Nathaniel P. Banks

First Division - Brig. Gen. Alpheus S. Williams

First Brigade - Col. Dudley Donnelly

5th Connecticut - Lt. Col. George D. Chapman

28th New York - Lt. Col. Edwin F. Brown

46th Pennsylvania - Col. Joseph F. Knipe

Third Brigade - Col. George H. Gordon

2d Massachusetts - Lt. Col. George L. Andrews

29th Pennsylvania - Col. John K. Murphy

27th Indiana - Col. Silas Colgrove

3d Wisconsin - Col. Thomas H. Ruger

Cavalry -

1st Michigan (5 Co's) - Col. Thornton F. Brodhead

Artillery - Capt. Robert B. Hampton

Battery M, 1st New York - Lt. James H. Peabody

Battery F, Pennsylvania Arty. - Lt. J. Presley Fleming

Battery F, 4th U.S. - Lt. Franklin B. Crosby

Cavalry Brigade - Brig. Gen. John B. Hatch

1st Maine (5 Co's) - Lt. Col. Calvin S. Douty

1st Vermont - Col. Charles H. Tompkins

5th New York - Col. Othneil De Forest

1st Maryland (5 Co's) - Lt. Col. Charles Wetschky

Unattached Units -

10th Maine - Col. George L. Beal

8th New York Cav. (5 Co's, dismtd.) - Lt. Col. Charles R. Babbitt Collis' Zouaves -

Capt. Charles H.T. Collis

Front Royal Outpost - Col. John R. Kenly

1st Maryland - Col. John R. Kenly

29th Pennsylvania (2 Co's) -

Battery E, Pennsylvania Arty. (1 Sect.) - Lt. Charles A. Atwell

⁷⁰⁸**Battles and Leaders,**

The Opposing Forces at Front Royal and Winchester⁷⁰⁹
(TABLE 7B)

The Confederate Army
(c. 17,000 men)

Maj. Gen. Thomas J. Jackson

Jackson's Division - Maj. Gen. Thomas J. Jackson

First Brigade - Brig. Gen. Charles S. Winder

2d Virginia - Col. J.W. Allen

4th Virginia - Col. Charles A. Ronald

5th Virginia - Col. W.S.H. Baylor

27th Virginia - Col. A.J. Grigsby

33d Virginia - Col. John F. Neff

Second Brigade - Col. J.A. Campbell

21st Virginia - Col. John M. Patton

42d Virginia - Maj. Henry Lane

48th Virginia - Capt. Samuel Hale

1st Virginia (Irish) Battalion - Capt. B.W. Leigh

Third Brigade - Col. Samuel V. Fulkerson

10th Virginia - Col. E.T.H. Warren

23d Virginia - Col. A.G. Taliaferro

37th Virginia - Maj. T.V. Williams

Artillery - Col. S. Crutchfield

Carpenter's (Virginia) Battery - Capt. Joseph Carpenter

Caskie's (Virginia) Battery - Capt. William H. Caskie

Cutshaw's (Virginia) Battery - Capt. W.E. Cutshaw

Poague's (Virginia) Battery - Capt. William T. Poague

Wooding's (Virginia) Battery - Capt. George W. Wooding

⁷⁰⁹Ibid.,

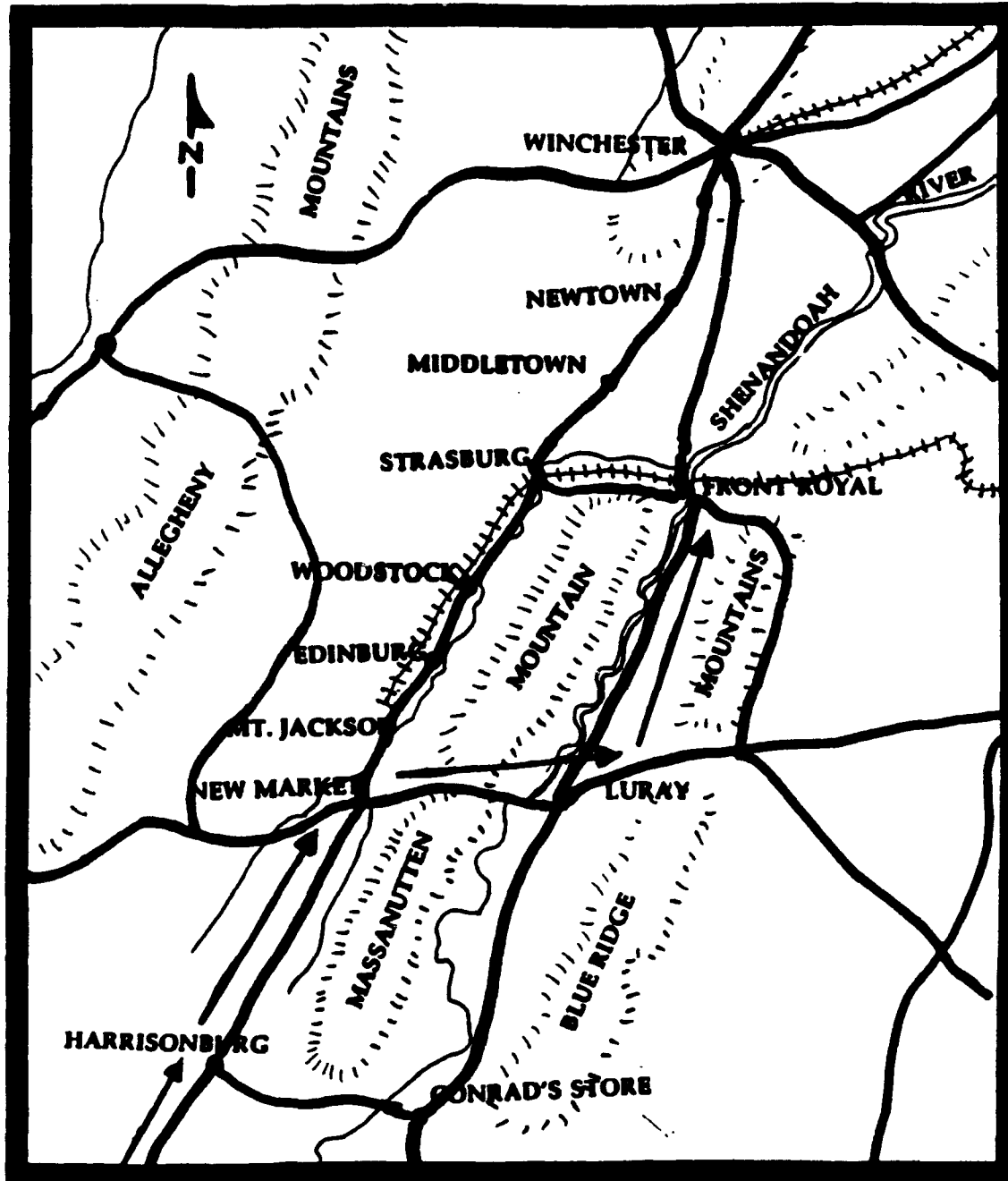
THE OPPOSING FORCES AT WINCHESTER AND FRONT ROYAL
(TABLE 7B continued)

Ewell's Division - Maj. Gen. Richard S. Ewell
Second Brigade - Col. W.C. Scott
44th Virginia - Col. Scott
52d Virginia - Lt. Col. James H. Skinner
58th Virginia - Col. Samuel H. Letcher
Fourth Brigade - Brig. Gen. Arnold Elzey
13th Virginia - Col. J.A. Walker
31st Virginia - Col. John S. Hoffman
25th Virginia - Lt. Col. Patrick B. Duffy
12th Georgia - Col. Z.T. Conner
Seventh Brigade - Brig. Gen. Isaac R. Trimble
21st North Carolina - Col. W.W. Kirkland
21st Georgia - Col. J.T. Mercer
15th Alabama - Col. James Cantey
16th Mississippi - Col. Carnot Posey
Eighth Brigade - Brig. Gen. Richard Taylor
6th Louisiana - Col. Isaac G. Seymour
7th Louisiana - Col. Harry T. Hays
8th Louisiana - Col. H.B. Kelly
9th Louisiana - Col. Leroy A. Stafford
Louisiana Special Battalion - Maj. C.R. Wheat
Maryland Line⁷¹⁰ - Brig. Gen. George H. Steuart
1st Maryland - Col. Bradley T. Johnson
Company A, Maryland Cav. - Capt. Ridgley Brown
Baltimore Battery - Capt. J.B. Brockenbrough
Artillery -
Latimer's (Virginia) Battery - Lt. J.W. Latimer
Lusk's (Virginia) Battery - Capt. John A.M. Lusk
Raine's (Virginia) Battery - Capt. Charles I. Raine
Rice's (Virginia) Battery - Capt. William H. Rice

Cavalry - Col. Turner Ashby
2d Virginia - Lt. Col. James W. Watts
6th Virginia - Col. Thomas Flournoy
7th Virginia - Col. Turner Ashby
Chew's (Virginia) Battery - Capt. R.P. Chew

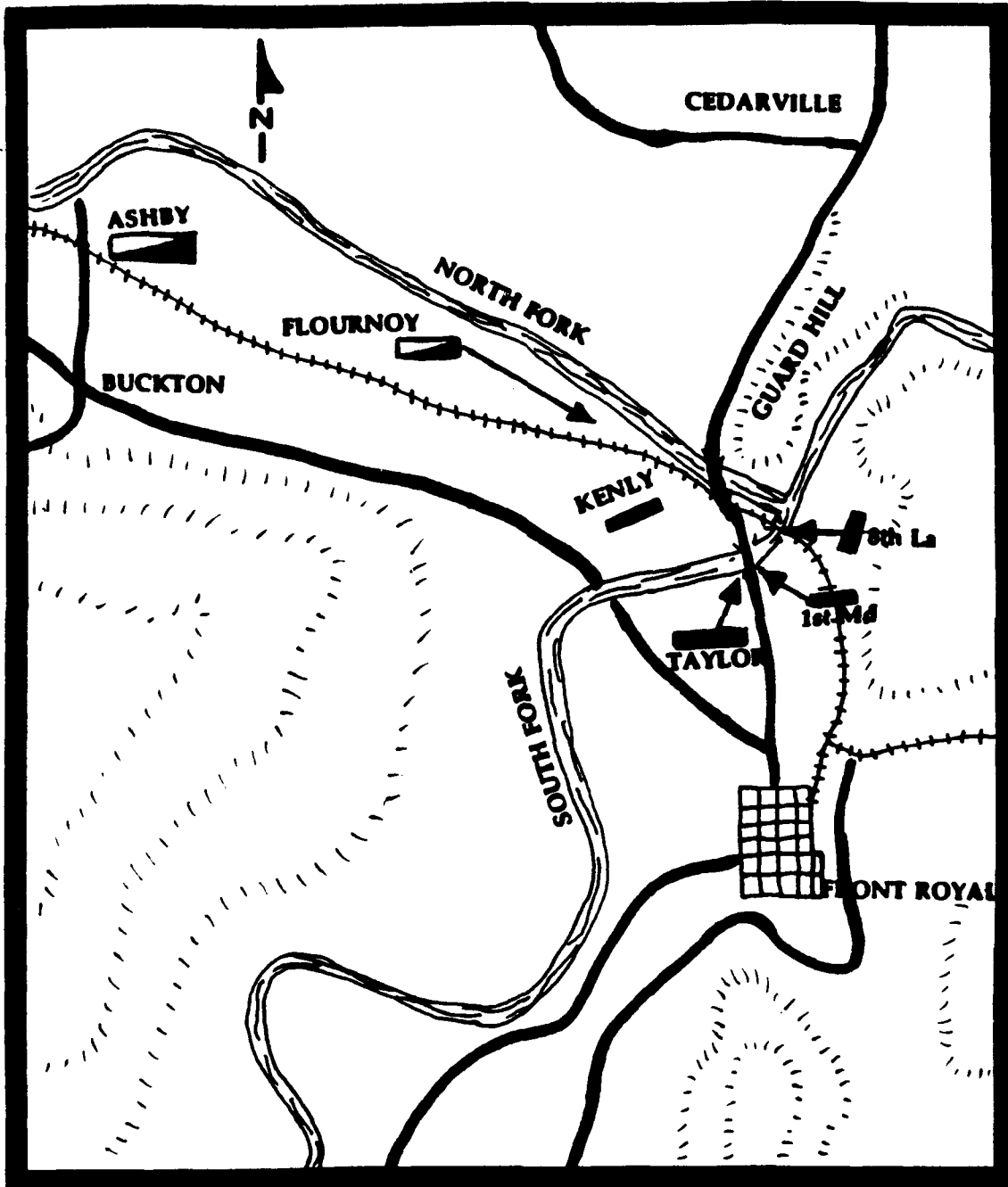
⁷¹⁰The Maryland Line had been organized by Jackson on 17 May in accordance with instructions from the Confederate War Department.

MAP 12



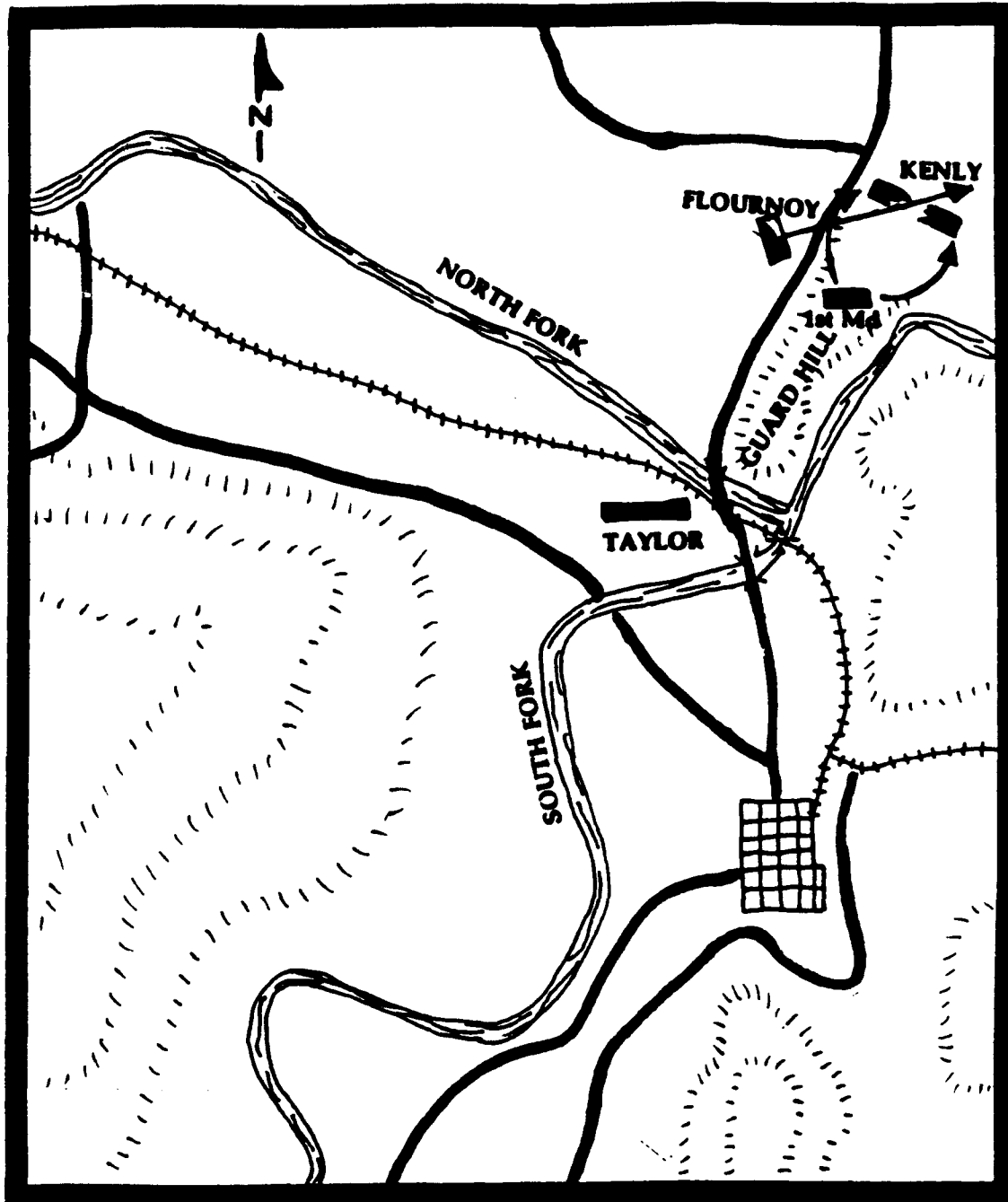
THE CONFEDERATE ROUTE TO FRONT ROYAL

MAP 13



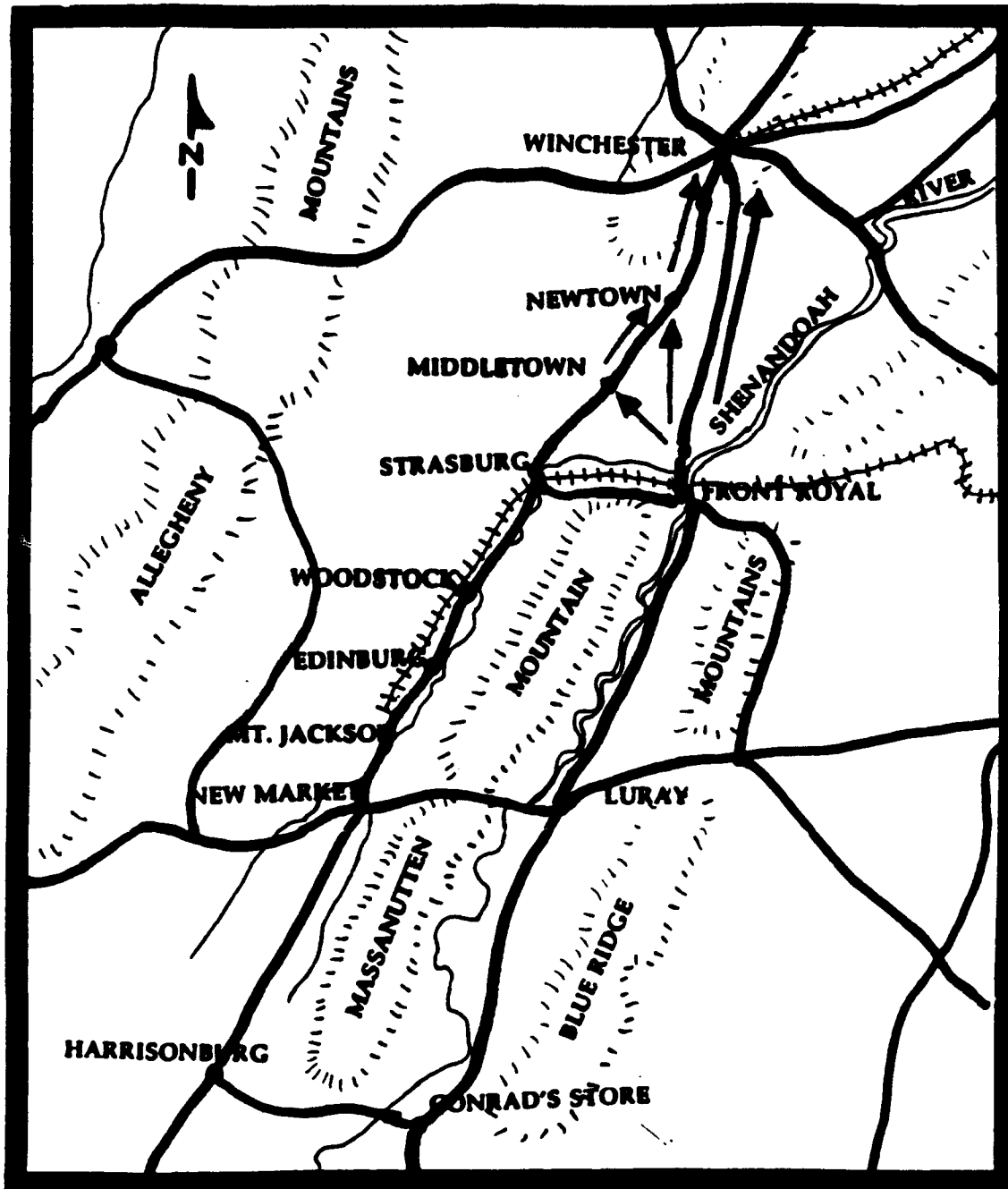
BATTLE OF FRONT ROYAL

MAP 14



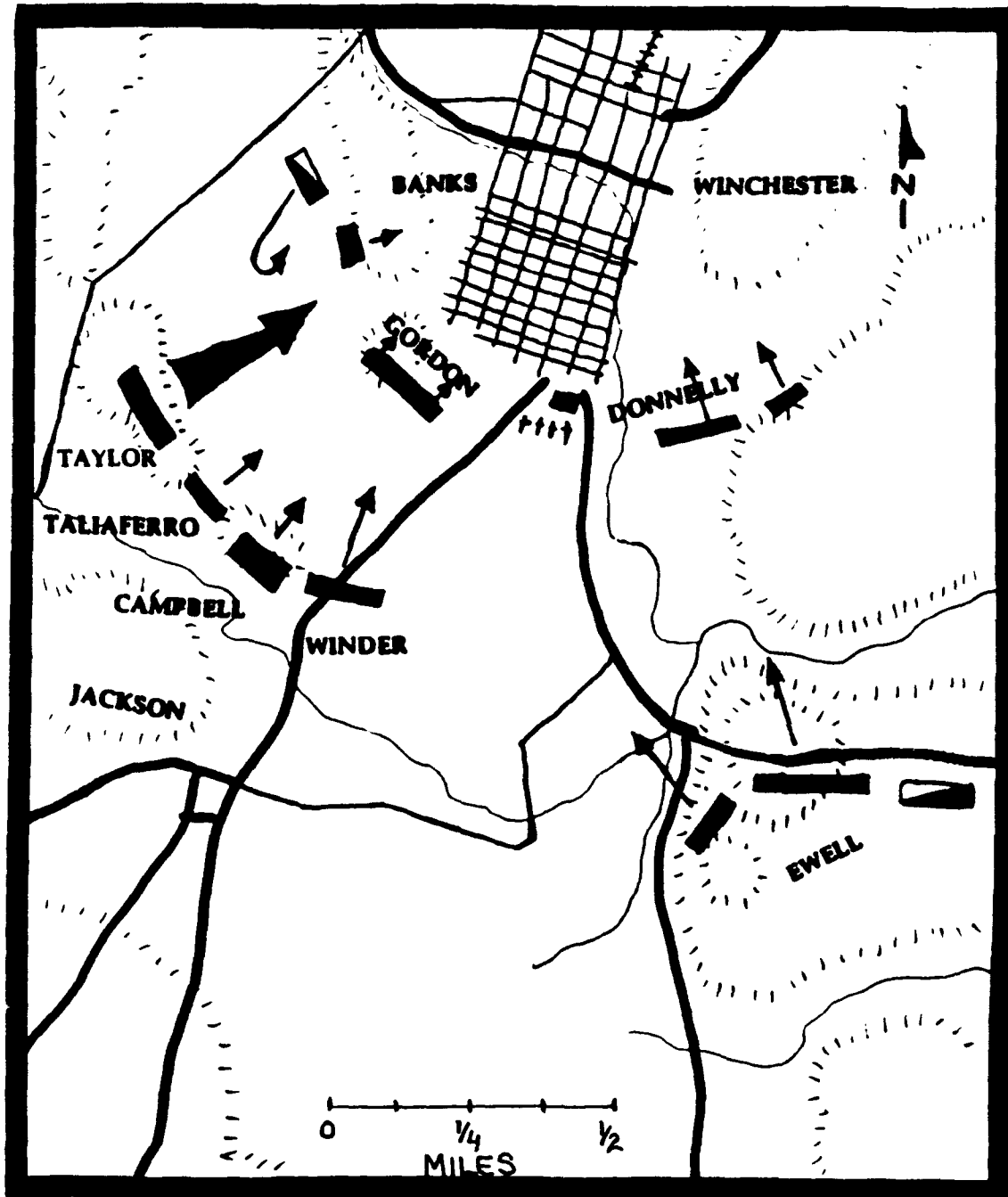
THE CONFEDERATE PURSUIT TO CEDARVILLE

MAP 15



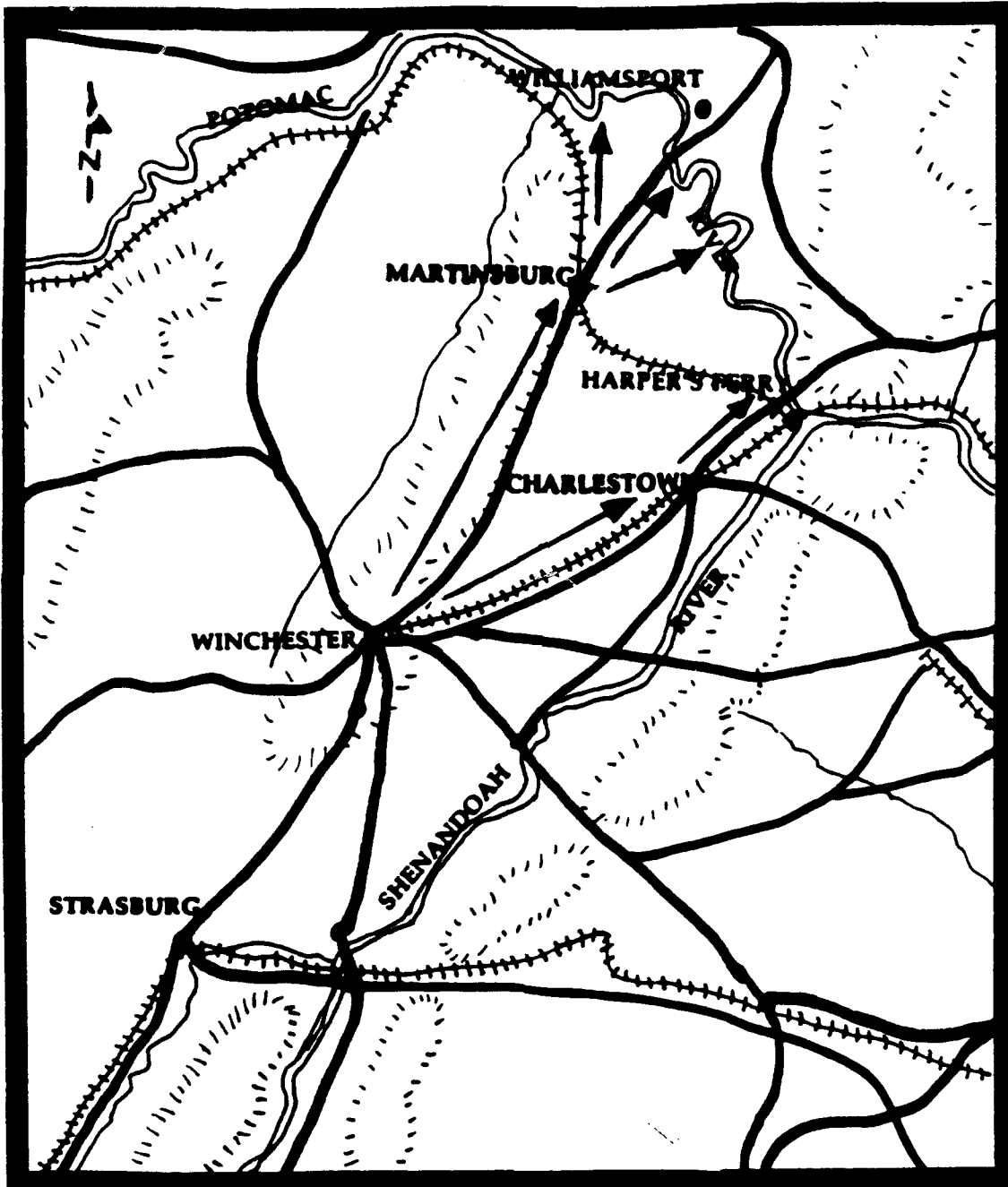
THE CONFEDERATE PURSUIT TO WINCHESTER

MAP 16



BATTLE OF WINCHESTER

MAP 17



THE CONFEDERATE ADVANCE TO THE POTOMAC

VI. CONCLUSIONS

A. CAMPAIGN EPILOGUE

The Confederate offensive in the Valley had ended. Without sufficient reinforcements, Jackson could not continue his advance by crossing the Potomac and invading Maryland. The Federal positions at Harper's Ferry appeared too strong to attempt an attack against that garrison. Union reinforcements were reported arriving across the Potomac to bolster Banks' position at Williamsport, Fremont was approaching from the west, and McDowell was moving toward the Valley from the east. Jackson now had to worry about saving his command from overwhelming enemy forces that were rapidly advancing towards Winchester.

With the realization that superior Federal forces were closing on the Confederate rear, Jackson began the southward withdrawal of his army on 30 May. The decision to move was made none too soon. That same day, Gen. Shields' Federal division arrived at Front Royal, surprising the 12th Georgia which had been left to guard that position. Both Fremont and Shields were now closer to Strasburg, along the Confederate line of retreat up the Valley, than Jackson was himself. While most of the Southern troops began the retrograde, Jedediah Hotchkiss was dispatched to bring Winder's brigade, which was still at Harper's Ferry, to Strasburg.

By 2:30 p.m. on the 31st, all of Jackson's infantry except the Stonewall Brigade had cleared Winchester.⁷¹¹ An attempted advance by a Federal brigade from Front Royal was halted by a Confederate outpost east of Strasburg. On the morning of 1 June, Ewell's division skirmished with Fremont's army several miles west of Strasburg and easily held the Federal force at bay.⁷¹² Late that afternoon, Winder's weary brigade finally caught up with the rest of Jackson's army.⁷¹³

For the next several days the Confederates continued their retreat up the Valley turnpike with Fremont's Federals in hot pursuit. Winder's and Taylor's infantry brigades and Ashby's cavalry fought a determined rear guard action throughout much of the retreat to protect the Confederate main body. Attempts to slow the Federal pursuit by burning several bridges along the line of march met with only limited success. Fremont was able to use pontoons to construct expedient bridges over the waterways and the Federal pursuit continued. As Fremont pressed the retreating Confederates along the Valley pike, Shields was moving up the Luray Valley, paralleling Jackson's route.⁷¹⁴

Upon reaching Harrisonburg on the 5th, Jackson moved east toward the small town of Port Republic.⁷¹⁵ The next day, in another skirmish between the

⁷¹¹Freeman, 419.

⁷¹²Taylor, 64-69.

⁷¹³Freeman, 421.

⁷¹⁴Freeman, 420-428.

⁷¹⁵Taylor, 75.

Confederate rear guard and Fremont's advance, Col. Ashby was killed while leading a counterattack against some Federal infantry. The loss was an irreplaceable one for Jackson. The deaths of Ashby, who "...seemed to have the faculty of knowing what the enemy were doing and when they were doing it,"⁷¹⁶ and the cavalry chief's three most capable subordinates since 23 May would cause serious shortcomings in the cavalry's ability to monitor and resist Federal movements. After reaching Port Republic, Jackson placed his troops into camp for the next several days. Ewell's division held the rear against Fremont's advance.

On the 8th, Fremont finally launched an attack against Ewell's division a couple of miles west of Port Republic near the village of Cross Keys. At around 10:00 a.m., after driving the 8th Alabama, an advanced outpost, back to Ewell's main line, the Federals advanced against Trimble's brigade on the Confederate right. The Southern troops waited until the Union troops were in the open, close to the Confederate line, and then easily repulsed the Federal attack with two volleys. After another 15 minutes of relative inactivity, however, the combative Brig. Gen. Trimble grew bored and launched a counterattack against the Federals, driving Fremont's left back 1 mile before stopping. Although Fremont's force of 10,500 still outnumbered Ewell by more than 2-to-1, the Federals failed to resume the attack. That night, Ewell left Trimble with seven regiments to hold Fremont in place and then withdrew the rest of his division to Port Republic.

⁷¹⁶Worsham, 77.

On the 9th, Jackson attacked part of Shields' division just north of Port Republic. The Confederates substantially outnumbered the two Federal brigades that had positioned themselves between the South Fork of the Shenandoah and the Blue Ridge. Because of the superior placement of Union artillery and the open character of the ground over which the Confederates advanced, however, the battle was not an easy victory for Jackson. Winder's brigade, the initial main effort of the Confederate attack, became stalled under heavy fire from the Union guns and three of Ewell's brigades had to be moved forward to stabilize the Confederate line. Only after a flanking attack by Taylor's brigade and the subsequent capture of the Union artillery were the Confederates able to force the retreat of the Federals.⁷¹⁷

Following the fights on the 8th and 9th, Federal commanders decided not to press the Confederates any farther. While Shields concentrated his force near Luray, Fremont actually began withdrawing to the north. By the 12th, Confederate cavalry had reoccupied Harrisonburg. Jackson's actions in the Valley had come to an end, though. During the early morning hours of 18 June, in keeping with discretionary orders of the 16th from Gen. Robert E. Lee, Jackson's troops began an eastward march across the Blue Ridge. Jackson was going to reinforce Lee in the defense of Richmond.

The results of Jackson's campaign were significant. The Union's strategic plans had been severely disrupted, Federal attention had been drawn from Richmond, large numbers of Federal troops had been diverted from other areas of operation, and

⁷¹⁷Freeman, 450-460.

Federal field forces had been defeated in battle. The Valley had been saved from Federal occupation. Although Union and Confederate forces would fight for control of the Valley throughout the course of the war, it was not until the autumn of 1864 that the Federals would finally commit sufficient forces and energy to deny the South access to the Valley's agricultural riches. Banks' army had been shattered as an effective fighting force. The Federal force had suffered about 3,000 casualties during the battles at Front Royal and Winchester. It would be months before it was again ready for any active field service. Fremont's plan to march into eastern Kentucky had been shelved in the wake of Jackson's attack on Milroy and the march to reinforce Banks. Further, Fremont claimed that the actions against Jackson in the Alleghennies, the march to reinforce Banks, and the ensuing pursuit of Jackson up the Valley had also rendered his army unfit for active campaigning. Rest, reinforcement, and reequipping would have to take place before this force was again ready to take the field. McDowell's plan to unite with McClellan's army had been postponed and temporary succor gained for besieged Richmond. Washington officials were hesitant to allow Federal military commanders to take chances in the field and demanded increased protection for the capital.

In contrast, the Confederates sought to continue the tempo of victory initiated by Jackson's bold offensive. After crossing the Blue Ridge and uniting with Lee's army northeast of Richmond, Jackson's troops were again in combat by the end of June. Although Jackson's own performance during the Seven Days' battles lacked the aggressiveness and drive that he had shown in the Valley, the presence of the veteran

Southern soldiers from the Valley contributed to McClellan's defeat and Lee's seizure of the operational initiative. When Jackson came under Lee's command, his performance in subsequent campaigns continued to illustrate an aggressive execution and exploitation of intelligence for operational success. At Chancellorsville, Jackson's last and, arguably, the Confederacy's best conceived and fought battle, Jackson used reports of the Union's open right flank as the basis for a bold flanking attack and succeeded in rolling up the entire right of the Federal position.

B. INTELLIGENCE SUMMARY OF THE CAMPAIGN

Throughout the course of the Valley campaign, Jackson had consistently used his available intelligence as the foundation for many of his operational decisions. In those situations where the Confederate commander specifically defined his intelligence requirements, aggressively sought to collect information, and decisively responded to intelligence assessments, Confederate operational capabilities were improved. Conversely, in those instances where Jackson ignored intelligence indications or failed to respond operationally to available intelligence, such as the battles at Kernstown and McDowell, Confederate operational performance was unsatisfactory.

Confederate intelligence during the winter expeditions against Dam No. 5 and Romney had served as the very basis for the development and refinement of Jackson's operational plans. Intelligence assessments based on reporting from a variety of sources had helped the Confederate commander to identify potential operational objectives, determine enemy dispositions, remain aware of possible Federal threats,

and recognize exploitable opportunities as they arose. During this phase of operations, Jackson began to develop an intelligence effort that would meet Confederate needs throughout the course of the Valley campaign.

Jackson was already somewhat familiar with the area of operations when he assumed control of the district in November 1861. His pre-war travels and residency in the region, and his previous command of the Confederate garrison at Harper's Ferry, had exposed him to some of the significant features of the Valley that had to be considered in any operational planning. This general knowledge of the region allowed him to understand the military situation in the context of its geographic surroundings. Initial reports from cavalry scouts and civilian informants had rounded Jackson's preliminary intelligence picture by providing data on Federal force strengths and locations. Given this broad understanding of the operational military situation within his district, the Confederate commander was able to select some possible objectives and narrow the focus of his planning.

After deciding on Romney as the first objective of his planned offensive, Jackson began to focus his intelligence effort on that area as a means of refining and updating his operational plans. Although the Southern general had concluded that an attack against Kelley's Federal command in Romney would yield positive results, intelligence reports of Kelley's strengthened position then caused Jackson to change his objective to Dam No. 5, a target that was assessed to be important to the Federal war effort.

Jackson, therefore, concentrated his cavalry's scouting efforts at Dam No. 5 to locate the presence of any Federal forces in the area that might interfere with the destructive raid. At the dam itself, the Confederate general selected an officer who was knowledgeable about both the dam's construction and the surrounding area to lead the demolition party in its efforts to breach the structure. After the appearance of Federal forces near the site, Jackson openly dispatched Gen. Carson's brigade to another location to deceive Federal intelligence efforts as to the Confederates' true location.

Following the raid against Dam No. 5, Jackson again turned his attention toward Romney after Confederate scouts reported the continued reinforcement of that Federal post and the growing threat that it posed to Confederate operations in the Valley. As Confederate forces concentrated at Winchester for an advance against Kelley's Union force, Jackson directed Ashby's mounted scouts to specifically determine the location and movement of any Federal forces in the vicinity of Romney that might interfere with his own advance against the town. The Confederate commander even reminded Ashby that his own operational planning would have to wait until the scouts had provided this essential information.

During the actual westward advance against Romney, Jackson's continued emphasis on intelligence allowed him to flexibly respond to changes in the operational situation and capitalize on enemy vulnerabilities. The commander's forward positioning at Bath allowed him to properly deploy the Confederate units once the enemy positions were identified and also permitted the rapid pursuit of the

fleeing Federal troops after the collapse of the Union position. Continuing reconnaissance helped Jackson determine when it was time to call off his subsequent offensive actions against Hancock and return to the advance against Romney. Capt. Sheetz' diligent surveillance of Kelley's force allowed for the rapid occupation of Romney following the Federal evacuation and kept Jackson informed about the succeeding positions of the Union units as they moved north into Maryland.

Jackson's disposition of Confederate forces following the successful occupation of Romney had been a perfect balance of intelligence and operational considerations. Based on his own understanding of the characteristics of the area of operations and the relative strength and locations of Federal forces, Jackson had deployed his own units to provide for both warning of any change in the enemy situation and an operational response to those changes. Confederate scouts, outposts, and patrols were scattered throughout the region to monitor Federal activity while Southern operational units were placed in positions to quickly respond to any perceived threat. Although the War Department's peremptory orders of 30 January 1862 were a basic rejection of Jackson's intelligence assessment and resulting operational decisions, the Confederate commander continued to correctly base his own dispositions upon the operational reality that his intelligence assets revealed.

During the Federal offensive in March and April, Jackson aggressively used his intelligence assets as a means of monitoring the potential threat that Banks' force posed to the Confederates and also sought to identify enemy vulnerabilities that might suggest an operational opportunity. Jackson also attempted to minimize

Federal intelligence efforts throughout this period while consistently directing his own collection assets to look for enemy weaknesses. Although Jackson's failure to aggressively collect and operationally respond to intelligence during the battle of Kernstown contributed to the Confederate loss there, the subsequent revitalization of Confederate intelligence led to successful operational decisions later in the campaign.

Information from scouts, spies, and open source reporting had kept Jackson up-to-date on the growing Federal presence near Williamsport and opposite Harper's Ferry. Based on his own knowledge of the region's geography and the importance of the Baltimore and Ohio Railroad, the Confederate commander was able to deduce the Federal commander's intent to advance on Winchester and clear the Confederates from the lower Valley. Jackson had, therefore, concentrated his reconnaissance assets near Harper's Ferry and, following the Federal river crossing in late February, had directed his scouts to constantly monitor the progress of the Federal advance. Although Jackson maintained a centralized control over all of the intelligence assets within his command, he ensured that subordinate commanders received pertinent intelligence reports and were also kept abreast of all enemy activity near their own areas of responsibility.

During the Federal advance on Winchester, the Southern general also began the use of his cavalry to screen the activities of the Confederate force and to prevent Union reconnaissance patrols from gaining any useful information about his main body. While Gen. Banks was consistently aware of Ashby's mounted presence, he was rarely able to determine the true location of the Confederate infantry brigades. Denied of

this vital intelligence, the Federals were forced into a cautious advance against the hidden Southerners.

Based on his assessment of the Federal commander's lack of aggressiveness and his desire to maintain some contact with the advance elements of the Federal column, Jackson yielded to the numerical superiority of the Union force only when necessary and slowly retreated up the Valley. By maintaining some contact with the Federal advance guard, Jackson could regularly monitor the enemy's progress and react accordingly. When any breaks in this surveillance occurred, the result was a corresponding gap in the intelligence picture.

One such intelligence gap developed after the Federal force began to send units east of the Blue Ridge. During the Union movements, Confederate cavalry scouts lost track of some of the Federal units, but assumed they had left the Valley. Ashby's unconfirmed intelligence report of a small, isolated Federal force at Kernstown prompted an immediate operational response by Jackson despite the fact that the whereabouts of all of the Federal units remained unknown. Ashby's initial actions against the Federals on 22 March failed to disclose the full size of Shields' Federal command and Jackson remained unaware that he was about to attack a superior force.

Various intelligence shortcomings contributed to the Confederate defeat in the ensuing battle at Kernstown. The Confederates arrived at the battlefield and deployed their units in plain sight of the Federal commanders, who were able to react accordingly. Jackson failed to initiate any kind of reconnaissance of the area or the enemy positions before committing his forces in an assault against the Federal right.

The Confederate general remained detached from the scene of combat throughout the battle and relied strictly on information from staff officers and subordinates in his response to Federal pressure. Finally, even when apprised of the obvious strength and composition of the Federal force, Jackson failed to respond appropriately to this vital intelligence and, instead, remain fixed on an unrealistic operational goal.

Following the battle, Jackson sought to improve some of his recognized intelligence shortcomings as part of an overall effort to enhance Confederate operational capabilities. The cavalry was again directed to maintain constant surveillance of the Federal force, especially the advance guard. An extensive mapping project was initiated to better understand the characteristics of the area of operations and to exploit the available terrain to the Confederates' advantage. Talented experts, such as Hotchkiss, and reliable collection sources, such as Col. Ashby, Capt. Sheetz, and selected civilian spies, were increasingly relied upon for essential information and intelligence assessments. Suspected deficiencies, like the increasing lack of discipline among the cavalry, were addressed in preparation for renewed operations.

As Jackson's command occupied its camp near Conrad's Store, intelligence from various sources suggested an operational opportunity for the Confederates in the Valley. Information regarding the Federal offensive against Richmond, reports of the Fremont's slow advance in the Alleghennies, the continued diversion of troops from Banks' command to Federal forces outside the Valley, and Jackson's own assessment of probable Federal reactions prompted the Confederate commander to plan a daring offensive of his own in the Valley. If Jackson's intelligence assessment was correct,

the Confederates might be able transform Jackson's operational level offensive into a campaign of strategic importance.

Based on intelligence reports from Gen. Edward Johnson, assessments of the district's geography, and Ashby's surveillance of Banks, Jackson decided on an advance against Milroy's isolated Federal force as the first phase of his offensive campaign. While the Confederate commander executed a generally superior intelligence effort on the operational level throughout this westward advance, he occasionally failed to transfer this success to the tactical level. Jackson retained centralized control over the various intelligence assets throughout the Valley District and successfully monitored the activities of both Banks' and Fremont's commands.

Although Jackson was attacking Milroy in the Alleghennies, Banks' Federal command at Harrisonburg still posed a potential threat to Jackson's flank and rear. Ashby's command was, therefore, left behind to watch Banks and provide warning of any southward movement by the Federals while Gen. Ewell's force, which had occupied Jackson's former position in the Luray Valley, was to watch Banks from the east. Spies were dispatched to provide Ewell with information regarding any Federal movements and various local inhabitants furnished details about the local area.

The Confederate march across the Blue Ridge was a masterful deception designed to capitalize on the masking characteristics of the terrain and to confuse the Federals as to Jackson's whereabouts. The march reflected Jackson's own use of intelligence as the basis for operational planning and also illustrated his conscious desire to deny credible intelligence to the enemy. The surprised reaction of the citizens of Staunton

and Banks' continuing confusion about Jackson's intentions illustrated the success of the Confederate deception.

As the Confederates moved west from Staunton, Jackson focused his intelligence effort on the local area and enemy situation. Hotchkiss, who had previously surveyed the region, and Gen. Johnson, who had been operating in that area for almost a year, were relied upon for information regarding significant topographic and geographic considerations. Reliable staff officers were detailed to scout in advance of the army and, after sighting the Federals, were used as guides to move advance guard units into proper position.

The commanders' reconnaissance of McDowell and Sitlington's Hill provided the Confederate leaders with an updated, definitive picture of the Federal strength and dispositions and allowed Gen. Johnson to deploy his brigades atop the hill in an effective manner. Jackson's incorrect assessment of Federal intentions, however, set the stage for the rest of the Confederate intelligence effort in the upcoming battle. Although Gen. Johnson continued to reconnoiter his position and observe enemy movements, he did not possess the organic assets necessary to decisively exploit any perceived operational opportunities. Even after the initiation of the pre-emptive Federal attack, Jackson failed to act decisively or initiate any concerted intelligence collection to capitalize on Federal vulnerabilities. Instead, the Confederates reacted to each successive Federal threat in a piecemeal manner. Jackson again remained physically detached from the field of battle and simply fed more units to Johnson as the pressure from the Federals increased. Although the Confederates were left in

possession of the field, this victory was due more to strength of numbers than to an efficient use of intelligence or operational decisiveness.

As the pursuit of Milroy's fleeing column commenced, Jackson again illustrated the importance of understanding the area of operations. By blocking the Allegheny passes to the Valley, Jackson not only prevented the possibility of Federal reinforcement but also limited the courses of action available to the enemy. This would make subsequent assessments about enemy intentions much easier since certain capabilities were now denied to the Federals. Jackson's knowledge of the terrain near Franklin, coupled with scouting reports of Fremont's impending arrival, also contributed to the Confederate commander's decision to break contact with the Federals and return to the Valley.

While Jackson was engaged against Milroy and Fremont, Confederate intelligence in other parts of the district indicated another potential opportunity. The presence of several days' rations on some Federal prisoners and information from a Federal deserter indicated an eastward movement by significant elements of Banks' command. Ewell's subordinate cavalry tracked Shields' progress across the Blue Ridge and helped to confirm the diminished strength of the Federal force remaining in the Valley. Reports from cavalry scouts and several civilian informants also revealed that Banks was abandoning Harrisonburg and was falling back towards Strasburg, a much less desirable point for the Federal defense of the lower Valley.

After returning to the Valley in mid-May, Jackson prepared for the next phase of his offensive. Reports regarding the weakened condition of the Federal forces near

Strasburg, coupled with the increased size of Confederate combat assets, led Jackson to opt for an attack down the Valley against Banks' command. Throughout the Confederate advance to the Potomac, it might be argued that Jackson's intelligence effort and resultant operational planning were at their best and were actually better than the Confederate execution of the operation. While the Southern general consistently directed his intelligence effort toward a better understanding of the operational picture and then transferred this knowledge into effective plans, shortcomings in the execution of combat operations led to a less-than-complete victory for the Confederates. Nonetheless, the success of the resulting Confederate offensive was sufficient to shatter the strategic plans of the Federal government.

Accounts from Ashby's scouts and local inhabitants allowed Jackson to locate the positions of the Federal main body at Strasburg and Kenly's outpost at Front Royal and to grasp the suggested vulnerability of the latter Federal detachment. Supplementary reports by trusted staff officers and Jackson's assessment of the terrain had then helped the Confederate commander devise his plan of maneuver for the attack. The ensuing march across the Massanutten helped to deceive Federal commanders as to true Confederate intentions and concealed the Southern troops in their movement against Banks' flank. Jackson's use of the Luray Valley as an avenue of approach illustrated the Confederate commander's understanding of the use of terrain to conceal his own movements, protect his own flanks, and speed the northward movement of the Confederate army.

As Jackson approached Front Royal, he incorporated recent reports from Hotchkiss, Lt. Boswell, and the cavalry to update the operational picture and to refine his operational plans. Ashby's cavalry was dispatched to prevent the communication of Federal intelligence from Front Royal to Strasburg and other mounted troops continued to screen and watch Banks' command. Confederate cavalry actions against Kenly's outposts helped to delay Federal warning of the Southerners' approach and provided an advanced reconnaissance of the route of advance. Further, Jackson's selection of the Gooney Manor Road once again revealed his use of terrain assessments and helped to conceal the Confederate approach.

The Confederate commander's placement with the advance elements of the Confederate force allowed for the consistent interaction of intelligence and operational decision making during the battle at Front Royal. Jackson's position near the front of his column allowed for the rapid assessment of current information provided by a civilian informant and the use of this intelligence in the decision to launch an immediate attack on the town. Gen. Taylor's personal reconnaissance of the enemy position and Jackson's co-location with Taylor's brigade, which constituted the Confederate main effort, also contributed to the Confederate seizure of the bridges and ensuing assault against the Federal position. Additionally, the Confederate commander's forward presence also ensured a rapid pursuit and capture of the fleeing Federals at Cedarville. Although the absence of rifled artillery with the Confederate vanguard had almost allowed the Federals to escape, Jackson's rapid grasp of the situation and his authority, as the commander, to order Flournoy's cavalry in pursuit

had resulted in the complete destruction of the Federal command.

Following the victory at Front Royal, Jackson dispatched various intelligence assets to determine the location and disposition of Banks' main body. No attack against the Federals could take place until the main concentration of the enemy force was found. Topographer Jedediah Hotchkiss and several cavalry detachments were sent to specifically determine the Federal position. In his orders for the movement against the Federals, Jackson also directed his subordinate commands to advance along different routes in an effort to find and fix the Federal force.

Jackson's movement with the Confederate advance during the march to intercept Banks and the subsequent pursuit of the Federal army increased his effective use of current intelligence. After learning from civilian sources that most of the Federal force had already passed Middletown, Jackson ordered an immediate attack against the enemy column and brought up other Confederate units to continue the northward pursuit along the turnpike. Throughout the nighttime pursuit to Winchester, Jackson remained aware of the Federal presence to his front, effectively countered Union rear guard actions, and maintained the operational tempo of his command. The Confederate commander also capitalized on his men's knowledge of the terrain as he used soldiers from the local area for the advance element of his column during the pursuit to Winchester. Additionally, his own assessment of significant terrain led him to order the occupation of the southern ridgeline near Winchester.

During the battle at Winchester, Jackson's presence at the front of the Confederate battle line again contributed to his ability to translate assessments of the operational

situation into decisive actions. The Confederate commander perceived the increased resistance offered by the Federal right and, after a reconnaissance of the ground, ordered Taylor's brigade to assault the enemy position. Jackson then personally positioned the brigade in its attack position, an area he had selected during his survey of the field. After observing Taylor's success, and the resultant faltering of the Federal line, Jackson ordered his entire army to advance.

The Confederate general's interpretation of the strategic military situation and his continued tracking of the fleeing Federals of Banks' command led him to continue his pursuit of Banks and threaten the Potomac line. Cavalry patrols and organic reconnaissance efforts allowed subordinate commanders to press the Federals and exploit enemy vulnerabilities as they appeared. Stuart's occupation of Martinsburg, Winder's attack at Charlestown, and the maneuvers against Harper's Ferry were all executed in the context of intelligence which revealed the potential advantages of these moves. Jackson's decision, finally to end the offensive had been based on his assessment of the growing threat to his rear, indicated by numerous reports of Fremont's and Shields' approach, and the operational capabilities of his own force.

C. CHARACTERISTICS OF JACKSON'S INTELLIGENCE

Clearly then, intelligence had formed the foundation for Jackson's operational decisions throughout the campaign. While Jackson's consistent use of intelligence during this period illustrates the necessary inclusion of intelligence in the operational planning process, several questions are suggested by that use. What themes or principles characterized Jackson's execution of the intelligence process, including its

use, to make it an efficient component of his decision making process? Further, what factors strengthened the effective interaction between Confederate intelligence and operations functions during the campaign?

Several factors within Jackson's execution of the intelligence process itself, contributed to the Confederate general's superior exploitation of intelligence throughout the offensive. One of the primary characteristics of Confederate intelligence during the campaign was its centralization at the operational level. While most intelligence efforts during the Civil War were informal, haphazard, and decentralized, Jackson's consolidated approach to the intelligence function allowed for effective centralized control and direction of the intelligence effort, the proper assignment of collection assets, a lack of duplicated effort, and the fulfillment of the commander's stated requirements.

From the time Jackson assumed command of the Valley District in November 1861, Confederate intelligence was focused towards the needs of and controlled by the district commander himself. The direction of the intelligence effort, assignment and use of various collection assets, major analysis, and use of that intelligence were all centered on Jackson, the operational commander. Jackson himself identified those pieces of information that were of significance to Confederate operational planning and then personally assigned the assets--Ashby's cavalry, staff officers, or civilian spies--to obtain that information. All intelligence reports were then sent back to Jackson's headquarters, where they were consolidated into a single, coherent intelligence picture for use in the development or refinement of Jackson's operational

plans. While the Confederate commander did ensure that subordinate commanders also received pertinent intelligence reports for their areas of responsibility, he did not dilute the efficiency of his own intelligence assets by attaching them to subordinate commands, nor did he rely on the unguided reconnaissance efforts of these subordinate commands to meet his own operational level intelligence needs.

This concentration of the intelligence effort, like the concentration of operational effort, resulted in numerous benefits for the Confederates. Given the limited assets available for the collection of information, the numerical inferiority of the Confederates when compared to the combined strength of the Federals, and the small and informal organization of Jackson's staff, the centralization of intelligence allowed for an effective approach to the intelligence problem. A focus on those issues of greatest significance, the fusion of information from various sources, the avoidance of conflicting reports and analysis, and a lack of duplicative effort also resulted from this concentration. While a diffuse intelligence effort would have lacked the necessary structure to fill all of the operational commander's intelligence gaps, Jackson's approach ensured that those elements that could have most impact upon Confederate operations received the most attention. The Confederate commander, therefore, consistently directed his collection assets to determine the location and activities of the enemy forces and also initiated a fundamental analysis of the area of operations to ensure maximum understanding and exploitation of significant physical features within the region. Because Confederate intelligence was centralized at the operational level, intelligence reports from various sources all flowed in to Jackson's

headquarters for inclusion in a comprehensive analysis of the operational situation. The resulting fusion of this all-source information allowed for a more coherent understanding of the potential impact of both the area of operations and the enemy situation on Confederate plans.

Another important element in Jackson's execution of the intelligence effort was the great deal of emphasis that he placed on analysis of the area of operations. While the examination and assessment of the Federal enemy situation remained the major focus of the Confederate intelligence effort, the potential impact of topography, production, and the local population on Confederate operational plans was also examined in detail. This allowed the Southern commander to exploit the various significant physical features of the district while his Union adversaries remained unaware of the potential threats and opportunities posed by the Valley's geography.

The Confederate commander's understanding of the significant features of the area of operations had formed the basis for many of his own operational plans. Jackson's inherent knowledge of the region formed the foundation of his decisions to attack Dam No. 5 in the destructive raid of December 1861 and to establish his own headquarters in Winchester while leaving Loring in Romney after the winter expedition of January 1862. The extensive mapping and topographic study executed by Jedediah Hotchkiss had proven invaluable during the planning of operations against Milroy, Kenly, and Banks. Route reconnaissance patrols and personal observations of the terrain at Front Royal and Winchester had served as the basis for subsequent troop movements and assaults.

The thorough study of the area of operations, as a result, provided Jackson with an understanding of the significant impact that the region's physical characteristics could have on military operations. It was only after this analysis had been included in the broader context of the operational situation that the Confederate commander was able to recognize the weaknesses of previously selected defensive positions or the opportunities suggested by the exploitation of masked axes of approach against the Federals. While analysis of the enemy situation allowed Jackson to identify various Federal threats or vulnerabilities, the included evaluation of the region's geography permitted the Confederates to optimize the impact of their military operations against the enemy.

Jackson's emphasis on enemy intentions, instead of just enemy capabilities, provides another interesting element of Confederate intelligence. While the analysis of Federal troop strengths, weaponry, supporting equipment, and organizational structure were important to the development of Confederate operational plans, Jackson clearly recognized that it was equally, if not more, important to assess what the enemy planned to do with these assets. While the determination of intent was far more difficult than the evaluation of capabilities, the insights provided by this analysis demanded its consideration during the analysis phase of the intelligence process. Jackson considered the determination of enemy intent so important to his own operational plans that he often initiated actions that served to limit the possible courses of action available to a Federal commander thereby narrowing possible enemy intentions.

Jackson's knowledge about the growing enemy presence at Williamsport and his understanding of Winchester's operationally significant location allowed him to deduce Banks' intent to attack the Confederate position at Winchester. Similarly, the Confederate commander's interpretation of Banks' slow pursuit after Kernstown led Jackson to conclude that the Federal commander did not intend to press his offensive up the Valley and allowed Jackson to opt for an offensive of his own. Jackson's failure to correctly interpret Milroy's intent to attack at McDowell led to a series of tactical errors that diminished the results of the Confederate victory in that battle. The obstruction of the Allegheny passes helped to narrow Fremont's possible intentions since it destroyed the capability to retreat eastward or be reinforced by Banks. Jackson's imposition of his own army between Banks and the Blue Ridge after the battle at Front Royal likewise helped the Confederate commander to deduce Banks' probable intent to retreat from Strasburg.

This emphasis on enemy intentions consistently aided Jackson in the subsequent application of the principles of war in his own operational plans. Because of his knowledge of the probable Federal courses of action, the Confederate general was able to seize the initiative from his enemies by preempting or countering the Federal moves. The Confederates maintained a rapid tempo of operations and consistently surprised the Union commanders, who had been unable to assess Jackson's intentions. Additionally, Jackson was able to successfully concentrate his main effort at the decisive point and exploit this situation through the habitual interpretation of his opponent's next move. Although knowledge of Federal capabilities provided a broad

framework on which Jackson could base his own operational plans, the determination of Federal intentions furnished Jackson with the necessary tools to refine his plans for optimal effect.

Jackson's reliance on and use of talented experts and experienced subordinates in the performance of particular intelligence functions also distinguished his approach to intelligence during the Valley campaign. As both the operational commander of all Confederate forces in the Valley District and the chief operational planner for that command, Jackson did not have enough time to thoroughly analyze all of the vitally important specifics that contributed to his intelligence effort. Nor did he have the expertise in certain areas, such as topography, to effectively interpret all of the significant considerations that had to be included in the overall intelligence assessment of the operational picture. Instead, Jackson learned to rely on individual staff officers, whose knowledge within a particular field was superior to his own, or on experienced subordinates whose previous intelligence assessments had proven to be reliable. While this exploitation of individual strengths, knowledge, and talent might seem like an obvious approach to competent intelligence, it was a factor often ignored during the Civil War.

Within weeks of his arrival in the Valley, Jackson had learned to trust the information and resulting assessments from his cavalry chief, Col. Turner Ashby. Ashby's assessments of Federal intentions and probable courses of action during the early phases of the campaign became known for their accuracy, leading Jackson to increasingly rely on Ashby's input in the formulation of operational plans. Although

the notable failure at Kernstown may have temporarily decreased Ashby's credibility with Jackson, the cavalryman's ability to interpret intelligence reports within the context of his own understanding of the dynamics of military operations, made him an invaluable asset to the Confederate commander. Subordinate mounted officers, such as Capt. Sheetz, had proven similarly dependable in their interpretation of enemy actions and their input to Jackson's intelligence effort was considerable. Gen. Taylor's evaluation of the Federal position at Front Royal had been accepted by Jackson as the foundation for the subsequent decision to seize the bridges and launch an immediate assault. Talented individuals, whose superior technical knowledge made them valuable assets, were also heavily relied upon by the Confederate commander. At the time of his appointment to Jackson's staff, Jedediah Hotchkiss held no military rank and lacked formal training as an engineer. Within days of Hotchkiss' posting, however, Jackson had accepted several of the self-taught topographer's assessments as the basis for changes in the Confederate position and was relying increasingly on Hotchkiss' knowledge of the geography in the development of offensive operational plans. Effective analysis and reporting by other staff officers led Jackson to use these individuals as personal reconnaissance assets who were frequently dispatched to update key pieces of the intelligence picture. Conversely, Jackson had also shown a willingness to reject assessments from subordinates and officers whose judgement he did not trust. Both Jackson's rejection of Loring's assessment of the Federal threat to Romney and his willingness to accept

Hotchkiss on his staff, despite the presence of other engineer officers, illustrate this point.

Perhaps the most important aspect of Confederate intelligence during the Valley campaign was its immediate support to combat operations. Throughout the campaign, intelligence was an integral of Jackson's operational plans. Intelligence formed the foundation upon which the Confederate commander developed his operational objectives, task forces, schemes of maneuver, and timing. The refined planning and conduct of Confederate operations, in turn, concentrated the intelligence effort towards specific requirements and helped to focus intelligence on those areas which were of significance to the commander. In this way, intelligence and operations functions acted as interrelated and inseparable parts of a larger whole. Several aspects of Jackson's approach to both intelligence and operations contributed to the successful integration of these interdependent functions.

The first element in Jackson's linkage of intelligence with operations was the active role that he played in both functions. Like most operational commanders during the Civil War, Jackson was the chief operational planner for his command. While modern military commanders are served by extensive staffs which perform much of this operations function, staffs during the Civil War were small and commanders did much of the work themselves. Almost entirely on his own, Jackson envisioned the operational objectives of the campaign, conceived the necessary schemes of maneuver to achieve these objectives, and developed the subordinate unit tasks necessary for the execution of the plan. While this involvement in operational

planning was common for commanders of the period, Jackson also took an extraordinarily aggressive role in the direction and use of intelligence. Jackson ensured that he remained the focal point for all intelligence reports and that analysis of both the enemy and the area of operations was done to meet his needs. As particular gaps in the intelligence picture appeared due to corresponding changes in the operational situation, Jackson quickly committed various collection assets to fill the gaps.

Jackson himself had designated that the location and monitoring of Federal movements were his primary intelligence concerns during the winter expeditions and the Federal advance up the Valley. The Confederate commander had ordered subordinate units to determine this information and to keep him updated of any changes in the operational situation. The general had specifically reminded Ashby, before the Romney expedition, of the need for complete information on the Federals and had urged Sheetz to be especially vigilant as Banks prepared to cross the Potomac. Jackson had repeatedly dispatched members of his personal staff to gather key pieces of information and to confirm reports from other sources. When he could obtain information through no other acceptable means, Jackson had been willing to perform reconnaissance activities himself to ensure the practical basis for operational decisions. This personal involvement in staying in touch with reality had thereby ensured the use of intelligence in every aspect of the decision making process.

The Confederate commander's flexible operational response to changes in the intelligence picture was another factor which contributed to the positive association

of intelligence with operations. Throughout the campaign, Jackson repeatedly altered his operational plans when current intelligence suggested the need to do so. Information regarding an increased Federal threat to Confederate forces, or assessments of a potential Confederate opportunity led the Southern general to change his operational objectives, schemes of maneuver, and force deployments to best meet these new circumstances.

In December 1861, for example, Jackson had shifted his objective from Romney to Dam No. 5 when intelligence indicated the superior size of the Federal force in Romney. Reports of an apparently isolated Federal force at Kernstown, although faulty, led the Confederate commander to shift from a defensive posture to an immediate offensive against the Federals. Although Jackson desired to continue his attack against Milroy and Schenck at Franklin, information about Fremont's approach influenced the general's decision to return to the Valley. Jackson's plan to continue his offensive across the Potomac in late May was canceled when the Confederate commander balanced his own operational capabilities with the intelligence about the approaching Federal reinforcements.

In those instances where Jackson failed to show this flexibility, Confederate operations suffered. At Kernstown, Jackson had remained fixed on the defeat of the supposedly isolated Federal force and, even when apprised of the inferior size of his own force and the counterattack developing on his left, failed to appropriately respond to intelligence that was counter to this operational goal. At McDowell, Jackson failed to alter his own defensive posture and delay of an attack against the

Federal position even after it became evident that the Federals were launching a pre-emptive attack of their own and would not idly await the development of a Confederate attack the following day. In both cases, Confederate assets were unnecessarily wasted and opportunities were missed.

One of the factors which contributed to Jackson's flexible operational response to updated intelligence was his forward positioning during much of the action. In those situations where Jackson had placed himself near the force assigned the main effort, he had been able to make use of the latest combat information, rapidly assess the situation in the context of the overall operational picture, and respond accordingly. During the attack on Bath in January, Jackson's presence with the Confederate advance allowed him to become aware of the Federal dispositions at first contact with the enemy, deploy his own forces for an assault, and direct the pursuit of the Federals toward Hancock. During the advance to the Potomac, the general's consistent location with the Southern vanguard gave him immediate access to current information and allowed for an immediate reaction. At Front Royal, Jackson's ability to quickly assess information from the front and his status as the overall Confederate commander allowed for the quick decision to launch Taylor's brigade in an attack against the town, the prompt issuance of orders to seize the bridges and assault Kenly's command, and the use of Flournoy's troops to capture the Federals. At Winchester, the Confederate commander's position at the front allowed him to decisively respond to the growing Federal resistance on the opposite ridge and to order a general advance when the first signs of a Federal collapse became apparent.

Finally, the fact that the intelligence effort was controlled and managed by the individual who was most active in the development of operational plans contributed, perhaps more than any other factor, to the successful integration of intelligence with operations. In his role as his own operations planner, Jackson was initially guided in his selection of broad objectives by a general understanding of the intelligence situation and Confederate operational capabilities. Jackson was then able to focus additional intelligence assets toward those objectives to refine his plans and to answer those specific requirements that he deemed as the most significant in the formulation of operational plans. Every piece of information provided by his collection assets could always be analyzed in the context of its operational significance. Further, intelligence which suggested new opportunities or dangers could immediately be used to refine his plans. Because Jackson was directing the collection and analysis phases of the intelligence process, there could never be any disconnect between his own priorities and the priorities of the intelligence effort. Appropriate collection assets were, therefore, always made available to fulfill the commander's requirements and any shortcomings which resulted from the failure to commit some asset in a collection role were clearly understood. Because of Jackson's control over every aspect of the Confederate intelligence effort, his operational planning was based on focused and comprehensive intelligence support.

D. APPLICATIONS FOR TODAY

The principles which characterized Jackson's approach to intelligence during the Valley campaign continue to have value and the potential for application in modern

military campaigns. While the implements of war, character of military forces, and organization of military staffs have undergone radical changes since the time of the Civil War, the fundamentals of military operations and the manner in which intelligence may support these operations remains more independent of time, place, and technology. Based on Jackson's conduct of intelligence in 1862, several broad principles may then be deduced for the successful conduct of intelligence in modern military ground operations.

Military intelligence must remain centralized at the operational level to maximize its effectiveness during combat operations. This concentration of the intelligence effort should involve the centralized direction of the overall intelligence effort, control of collection assets, and focus of analysis to meet the needs of the operational commander. While the needs of subordinate commands may not be met by the execution of this centralized intelligence effort, the emphasis on fulfilling the operational commander's requirements must remain the primary object of all intelligence throughout the area of operations since this commander will determine the overall direction and implementation of operational plans.

This centralization of intelligence at the operational level will yield several positive results. The most important of these is that, given the limited number of intelligence assets in both personnel and equipment, the pooling of collection resources allows for their most efficient use. Assets can be concentrated in a prioritized manner on those requirements that are of greatest significance to the proper development of operational plans. Unnecessary duplication of effort can be eliminated, conflicting

assessments avoided, confirmatory collection initiated, and analysis focused on central issues of concern only through the centralization of all intelligence assets. Additionally, because of the wide ranging concerns of operational level intelligence, many of the requirements of subordinate commanders will be met as a natural product of the larger intelligence effort.

Another lesson which may be drawn from Jackson's campaign is that intelligence must focus on understanding the significant features of the area of operations. While analysis of the enemy's potential impact on friendly operations usually receives plenty of attention, analysis of the potential impact, positive or negative, that the area of operations may have on operations is often overlooked or incomplete. In some cases, the existence of obstacles to movement or observation, patterns of transportation networks, the presence of population centers, types of vegetation, or products of an area may impose more restrictions on the conduct of friendly operations than an enemy force could. Similarly, control of a particularly significant feature or denial of enemy access to an area may offer operational advantages that must not be overlooked.

While the existence of accurate maps, advanced photographic systems, and modern reconnaissance assets may make access to information about an area of operations much easier than during the Civil War, this information must be analyzed in the context of its operational significance to be of value to a military commander. Features that might restrict movement, provide suitable points of defense, or furnish favorable axes of advance should be emphasized in the intelligence assessments given

to the commander and operational planners. Only through a complete understanding of the significance and value of these otherwise esoteric features can opportunities be recognized and exploited.

In its analysis of the enemy situation, operational intelligence must also emphasize the assessment of enemy intentions, not simply enemy capabilities. Throughout the Valley, campaign, Jackson's ability to deduce his enemy's intentions or to limit possible enemy courses of action, consistently improved his own chances for success. Although the determination of intentions is inherently more difficult than the specification of capabilities, these assessments are of much more value in the operational planning process. By knowing or surmising what actions an opponent is likely to take, a military commander may, in turn, plan his own operations to preempt an enemy move or exploit that move to his own advantage.

The determination of enemy intentions is a much more complex process than an assessment of enemy capabilities. While analysis of capabilities often focuses on "hard intelligence" such as enemy troop strengths, weaponry, locations, and military doctrine, the efforts to assess probable enemy intentions generally rely on more ambiguous evidence. The relationship of the operational situation to the strategic picture, an evaluation of the enemy commander's personality and past operating patterns, characteristics of the enemy's command and combat soldier style, and increased activity in a particular functional area may all provide clues to enemy intentions. Even an assessment of the enemy's probable order of adoption of several

courses of action may provide operational planners with sufficient knowledge to properly develop friendly actions.

Just as Jackson capitalized on the particular skills of Hotchkiss and Ashby, so too must modern military commanders and intelligence advisors recognize and make effective use of the personal talents, expertise, knowledge, and experience of various analysts and subordinate personnel to maximize the value and accuracy of their own intelligence effort. Military personnel assignments by service headquarters are almost always based on rank requirements, broad occupational specialties, and the bureaucratic classification of specific billets within an organization, rather than on some particular talent, skill or unique qualification of an individual. This system, therefore, fails to capitalize on specialized knowledge, experience, or education that may make an individual particularly valuable in the analysis of technical or specialized intelligence functions. To ensure the most effective collection, analysis, and use of intelligence in military operations, commanders must demand access to the most qualified personnel for the tasks at hand. Similarly, commanders and intelligence advisors must be willing to use, in their execution of the intelligence process, individuals of proven talent and experience, regardless of considerations of rank, formal training, or billet structure. Only in this way, can commanders be assured of maximizing the potential impact of intelligence.

Various steps may also be undertaken to improve the interaction between the intelligence and operations within modern militaries. Although intelligence and operations functions have been divided in the U.S. Armed Forces between two

different staff branches, these disciplines must act in unison. Because of the interdependency of these operations and intelligence, constant coordination and communication is necessary for intelligence to support operational planning.

The first consideration in the correlation between intelligence and operations is the leader's role in that relationship. The commander must play an active role in the intelligence process. Just as Jackson was the focal point for all Confederate intelligence activities during the Valley campaign, the modern commander must also ensure that his intelligence needs are being actively pursued and that the intelligence effort is focused on areas of operational significance. Given the complex nature of modern military operations and the vast array of subjects that require a commander's personal attention, many military leaders often rely exclusively on senior intelligence advisors to direct and supervise their intelligence effort. While this approach illustrates trust and confidence in the intelligence advisor's abilities, it also contributes to a less than optimal execution and use of the intelligence effort during operational planning. The failure to identify a particularly vital piece of information to the commander's planning, the failure to collect that essential information, or the improper interpretation and use of intelligence in the planning process could all result from a commander's relative detachment from intelligence. If intelligence is to form the foundation for the development and refinement of operational plans, commanders must personally set intelligence priorities.

The commander must be involved in the initial direction of the intelligence effort by first outlining the operational goals of the unit and by then identifying those

pieces of intelligence that will be vital to subsequent operational planning and execution. The commander and operations staff officers must understand the capabilities and limitations of their own intelligence assets and know what questions can and cannot be answered by intelligence. Because the commander naturally controls the collection assets required to provide the information, he must ensure that those assets are made available for intelligence collection and understand the possible shortcomings if those assets are not used. The commander must continue to supervise the collection and analysis of information to ensure that the proper focus is maintained to meet the unit's operational needs. As potential gaps or new requirements appear, the commander must refocus the energies of his intelligence staff to meet them. The commander must demand the rapid dissemination of intelligence to himself and the operations staff to allow for the inclusion of this intelligence in the development and revision of operational plans. It is only through this personal involvement, that a commander can be assured of the possible use of intelligence in his decision making.

Another lesson that may be drawn from Jackson's use of intelligence is that operational plans must remain flexible to ensure the appropriate response to significant changes reflected by updated intelligence. While the drafting of detailed, comprehensive operational plans often involves an intense reliance on intelligence input, many plans also fail to recognize the inherent need for flexibility once contact with the enemy is made. The nature of the uncertainty of war, the numerous frictions that develop in the course of active operations, and the realization that the enemy

almost always fails to react exactly as expected, illustrate the need for operational flexibility. At the operational level of warfare, changes in any part of the intelligence picture may warrant a corresponding need for change in the operations plan. Updated intelligence should lead to updated operations plans.

If a commander becomes too firmly fixed on the execution of a particular plan or the attainment of a specific objective, intelligence may lose its ability to influence or guide the decision making process. Intelligence that is contradictory to the successful completion of the assigned mission or that fails to report a commander's preconceived conclusions may fail to influence an inflexible commander. Throughout the Valley campaign, however, Jackson had shown a willingness, when presented with updated intelligence, to change his operational objectives, alter existing plans, and capitalize on transitory opportunities. Because the intelligence effort is designed to help support the development and refinement of operational planning and decision making, this planning must remain sufficiently adaptable to recognize the appearance of previously unexpected threats or to capitalize on enemy vulnerabilities revealed through new intelligence.

One of the major factors that may influence a commander's ability to flexibly respond to changes in the enemy situation is his position in relation to the area of action. During Confederate operations in the spring of 1862, Jackson's co-location with the force assigned the main effort and in the vanguard of the pursuit allowed him to quickly react to the reality around him. Modern commanders should also

position themselves as far forward as possible so they can maximize their influence on the course of operations.

While there may be a tendency to view a commander's forward presence as counterproductive because of the resulting detachment from a large headquarters staff and communications facility or because of the perception of micro-management, this proximity to the force assigned the main effort may be the most important element in the commander's ability to positively influence the course of battle. Although additional intelligence from non-organic assets may become available after the initiation of combat actions, the majority of valuable information that has a bearing upon the operation will come from units in contact with the enemy. By positioning himself near the point of major effort or those elements in contact with the enemy, the commander will become more accessible to current intelligence or combat information from those units, be personally aware of the condition of his own units, and able to respond more quickly to changes in the operational situation. Because the operational commander controls more assets than any subordinate leaders, his position near the front can obviously be more decisive than that of a subordinate commander. Based on current intelligence reports from front line units and his own unique perspective of the course of the action, the operational commander can then decide to shift his focus of main effort, commit additional assets to the decisive point, or call off the action.

Perhaps the most fundamental concept that should be applied to ensure the optimal influence of intelligence on the commander's decision making and, in turn,

the optimization of operational potential, is the organization of intelligence staff functions within the operations branch. Organizationally, intelligence should be a subordinate part of operations. While this idea is contrary to much of U.S. Armed Forces opinion regarding the relationship between intelligence and operations and to the present practices and organization of many military forces, it is also a logical recognition of existing reality. The successful conduct of operations remains the primary goal of all military organizations. The sole purpose of intelligence is the support of those operations to ensure their maximum success. Intelligence should initially serve as the broad-based indicator of possible objectives and enemy threats but must then be guided and focused towards more specific operationally significant requirements to allow for the refinement and maturation of operational plans. Throughout its execution, the intelligence process must be guided by the ongoing considerations of operational planners to ensure its continued relevancy. The operations branch must de facto supervise and focus the direction of the intelligence effort and must also provide sufficient assets to allow for the collection of needed information. Given these circumstances, it would appear that intelligence must operate, at least functionally, in a subordinate manner to operations.

The placement of the intelligence staff within the operations branch would yield numerous positive results to strengthen the integral link between intelligence and operational planning. First, intelligence efforts could be more positively focused towards areas of operational relevancy if they were subordinated to those officers responsible for the development of operational plans. While intelligence advisors

may not inherently know which pieces of information were the most vital to the development of a specific operational plan, operations officers would recognize their own information gaps and realize the priority of their own intelligence requirements. Second, operations officers would have easier access to the most current intelligence and could, therefore, more accurately reflect the realities of the intelligence picture in the development of their operational plans. Although modern communications systems allow for the rapid dissemination of intelligence, the filtering and inherent delays in the analysis phase of intelligence lead to corresponding delays in the passing of intelligence to the people that most need the information--commanders and operational planners. Third, because the commander and the operations branch control the organic collection assets that intelligence must rely on to gather information, an integrated operations and intelligence branch would allow for a more efficient execution of intelligence collection and understanding of the inherent trade-offs in the use of particular assets.

While the subordination of intelligence to the operations branch would allow for a more effective use of intelligence in operational planning and a more realistic approach to the supportive role of intelligence, this reorganization would also involve an assessment of other complex problems. Training and education of operations and intelligence personnel, realignment of appropriate experience tracks and career patterns, and a reorganization of command relationships with external agencies would all have to be addressed to implement this fundamental change in the intelligence - operations relationship within operational military commands. Although these issues

are complicated and have no easy solution, a closer correlation between these two staff functions is necessary to improve intelligence support to operational planning and, thereby, to optimize the success of military operations.

Jackson's organized execution and use of intelligence in support of Confederate operations served as the very foundation of his operational victory in the Valley campaign. His personal involvement in the direction of the intelligence effort, aggressive pursuit of relevant information, and flexible response to current intelligence allowed the Confederate commander to recognize various threats and opportunities as they arose. While Jackson's personal addressal to intelligence allowed for the recognition of factors that could impact on his own plans, it was his approach to intelligence and operations as inseparable parts of a larger whole that allowed him to achieve operational victories of strategic importance for the Confederacy. Modern military organizations would do well to duplicate the warfighting fundamentals of the situation operating within Jackson's command in the Valley campaign of 1862, which remain independent of time, place, or technology.

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